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DELAWARE DIGEST

Volume 35, No. 4

LABOR MARKET QUARTERLY ACTIVITY

4th Quarter 1990

Delaware's unemployment rate finishes the quarter at 6.0% in December after a low of 5.6% in October and a yearly high of 6.5% in November.

The Philadelphia Area Consumer Price Index rises 7.3% from December 1989 to December 1990, compared to a national rise of 6.1%.

The Commerce Department reports 1990 housing starts dip to their lowest levels since 1982, dropping 13.3% from the previous year.

Recessionary times plague the auto industry as the Big Three automakers begin 1991 with heavy losses.

State revenue projections for the current fiscal year and FY '92 continue to fall, prompting Delaware lawmakers to decide on further spending cuts and new ways to raise money.

Sparks fly as New Castle County Council gives the go-ahead for a controversial $200 million mall on the site of the former Brandywine Raceway.

Developers and City officials temporarily shelve plans for a proposed $68 million waterfront marketplace in downtown Wilmington.

Delmarva Power and Light donates 340 acres of land at Port Mahon for use as a wildlife preserve.

Sussex County Council develops a land-use plan to control development and preserve wetlands in Southern Delaware.

The Delaware Department of Labor releases the 2nd edition of the *Delaware Career Compass*, a highly successful career planning guide for students and job seekers throughout Delaware.

Office of Occupational and Labor Market Information
Delaware Occupational Information Coordinating Committee

Delaware Department of Labor
Jan E. Robinson, Secretary

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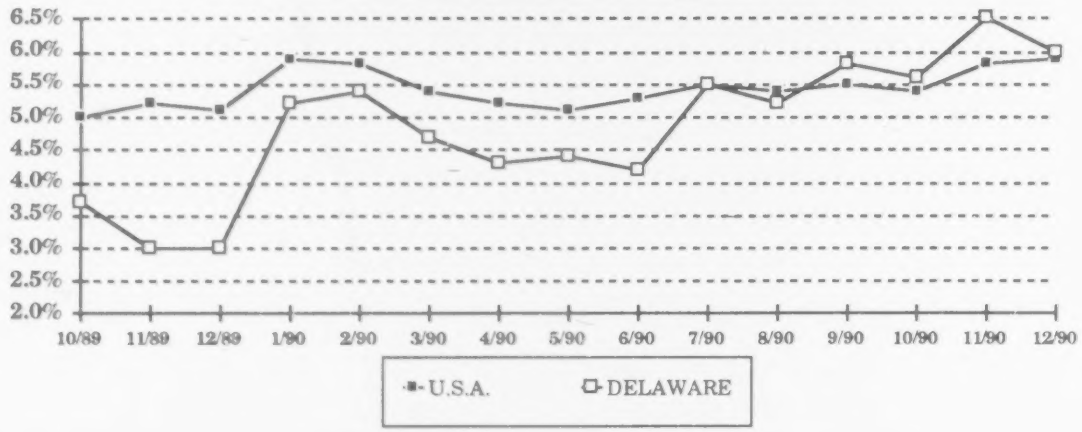
LABOR FORCE DEVELOPMENTS (TABLE 1: see page 10)

Delaware's unemployment rate for the fourth quarter of 1989 took a roller coaster ride, ending the period at 6.0% in December after a low of 5.6% in October and a yearly high of 6.5% in November. After maintaining one of the lowest unemployment rates nationally for the past couple of years, Delaware's jobless rate averaged 5.1% in 1990, ranking the First State 19th. Nationally, the unemployment rate averaged 5.7%, during the fourth quarter and 5.5% for the year. The quarterly average unemployment rate for the neighboring region of Pennsylvania, Maryland, New Jersey, and New York was 5.5%.

USA and Delaware Unemployment Rates
October 1989-December 1990



NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT (TABLES 2 and 2A: see pages 11 & 12)

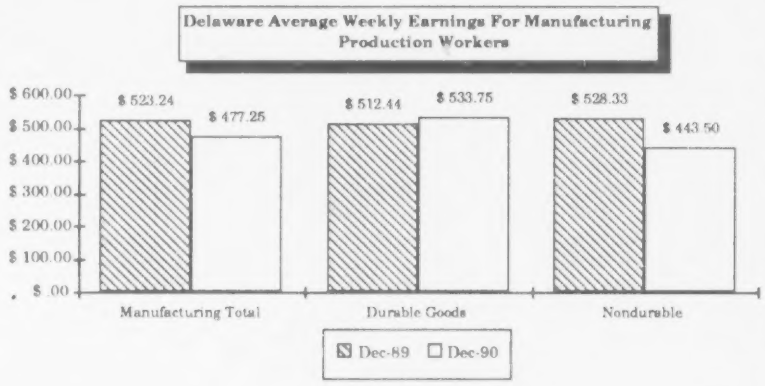
Total State nonagricultural wage and salary employment increased in October compared to September figures due to modest gains in such areas as Manufacturing; and Finance, Insurance, and Real Estate. Over the quarter, total employment decreased from 347,500 in October to 344,900 in December. Drops in Contract Construction; Manufacturing; and Services contributed to this decline.

Since December of 1989, employment has decreased by 4,900 jobs, primarily due to temporary layoffs in the auto industry. Gains were made in Transportation and Public Utilities; Finance, Insurance, and Real Estate; and Services.

The Wilmington Primary Metropolitan Statistical Area (PMSA), with average quarterly employment of 298,900, saw gains and losses similar to those experienced statewide.

HOURS AND EARNINGS (TABLE 3; see page 13)

Average weekly earnings of manufacturing production workers in Delaware decreased from October to December ($498.56-$477.25). This fourth-quarter decline is attributed to drops in Nondurables such as Food and Kindred Products; Textile and Apparel; Paper, Printing, and Publishing; and Chemicals. From December 1989-December 1990, average weekly earnings for manufacturing production workers dropped 8.8%. Weekly hours for the quarter averaged 41.2 hours, marginally lower than year-earlier figures. Hourly wages were slightly lower during the quarter compared to the same three-month period a year ago.



Wilmington Primary Metropolitan Statistical Area (PMSA) weekly earnings for the quarter averaged $596.26 compared to $649.31 for the same quarter a year ago. Weekly hours for the quarter averaged 42.4 hours, compared to 1989 fourth-quarter figures of 43.2. Hourly earnings were slightly lower compared to the same period a year ago.

UNEMPLOYMENT INSURANCE (UI) (TABLES 4 & 5; see pages 14 & 15)

Total weeks of regular UI benefits compensated during the fourth quarter of 1990 totaled 67,746 with benefits totaling $11,872,693. The average weekly payment for UI regular unemployment rose steadily throughout the quarter to $195. Continued claim counts registered 74,800, compared to 54,900 during the fourth quarter of 1989. This jump in claims can be credited, in part, to a softening of the economy as well as temporary layoffs in the auto industry.

CONSUMER PRICE INDEX (TABLE 6 ; see page 15)

The Philadelphia Area Consumer Price Index rose slightly during the fourth quarter, finishing the period at 139.4 in December. The quarterly increase is due, in part, to sector growth in Food and Beverages; Housing; Transportation; Medical; and Entertainment. Nationally, the December index registered minimal quarterly growth at 133.8 for a year-to-date change of 6.1 percent.

NATIONAL DEVELOPMENTS

Experts estimate that the real **Gross National Product** will continue to decline during the first quarter, despite indications the economy isn't as weak in certain key sectors as previously thought. The government's **measure of the country's output of goods and services** dipped at a 2% annual rate in the fourth quarter, rather than 2.1% as was originally reported in December. The Commerce Department says the trade deficit narrowed more than originally anticipated while business purchases of heavy equipment rose.

December's slight rise in the **Index of Leading Economic Indicators** has given some analysts hope that the recession could be over by mid-year. The Government's **barometer of future economic activity** saw a slight 0.1% rise in December, its first increase in six months. November's index dropped 1.1%, while October's declined 1.2 percent.

The U.S. Labor Department reports that prices charged by producers of goods slipped 0.1% in January after a seesaw fourth quarter. The **Producer Price Index** dropped 0.6% in December after posting a 0.1% gain in November and 1.5% jump in October. For 1990, producer prices rose 5.6%, their biggest jump since 1981. Analysts say drops in December and January were due to lower energy prices related to the Middle East crisis.

Experts are concerned about a continued drop in **industrial production** throughout the U.S. In January, industrial production levels fell 0.4%, while December saw a 1.1% downfall. Early fourth quarter figures weren't too promising as November production levels fell 1.8% and October numbers dipped 0.7 percent. Despite the fourth quarter downslide, analysts believe the declines are shrinking, signaling possible relief in the near future.

Housing starts in 1990 dropped to their lowest level since 1982. The **Commerce Department** reports housing starts dropped 13.3% last year compared to the previous year, primarily due to what economists call "war jitters and tight-fisted bankers." Housing starts in December fell 12% after a 9.3% upturn in November and 6% drop in October. December's figures were the lowest since 1982 and the first time in eight years they fell below one million for a month.

The new year hasn't been good to the **Big Three automakers** as sales by **General Motors, Ford**, and **Chrysler** dropped 29.9% during January. Sales of Japanese cars fell 18.8% during the same period. Chrysler took the biggest hit during the month as sales of its cars and trucks dropped 35.1%. Ford came in a close second with a 31.8% drop in sales, while General Motors saw a 26.2% sales skid. News from 1990 wasn't much better as the Big Three saw combined sales for the year drop 6.8%. Car sales, including those imported by the Big Three, drop 7.9% in 1990 while truck sales dipped 5 percent.

The **Christmas season** wasn't too joyous for many of the nation's retailers as **retail sales** fell well below expectations. Kenneth Macke of Dayton Hudson Corporation says Christmas was a sign that consumer confidence was as low as he'd seen it in 20 years, leaving little optimism for the first half of this year. Retail sales fell 0.4% in December, following a 0.1% drop in November, and a modest 0.1% gain in October. Excluding gasoline sales, retail sales fell 0.1% in October.

REGIONAL DEVELOPMENTS

The Boeing Corporation anticipates 300 new jobs at its Ridley Township, Pennsylvania helicopter facility to produce wing parts for the company's new 777 commercial airplane. Boeing has also signed a $250 million contract to upgrade the British Royal Air Force's fleet of Chinook helicopters. These two contracts are significant since the aerospace industry has been laying off people in droves. Boeing's 6,150 local employees are expected to keep their jobs.

In January, the **Roy F. Weston Company** of West Chester, Pennsylvania was awarded a **two-year, $4 million contract** to produce a combined environmental impact statement and report for the Lawrence Livermore National Laboratory of California.

Delaware and Pennsylvania transportation officials are discussing a plan to develop regular **bus service** between **Wilmington** and **West Chester**. This idea was discussed about two years ago, but died due to lack of interest. Mark McNulty of the Delaware Transportation Authority says current development and traffic problems along Route 202 make bus service a natural for the area. Under a tentative plan, the bus service would run every half hour during rush-hour and hourly during midday. Public hearings are scheduled on the plan.

STATE DEVELOPMENTS

State leaders are figuring out ways to come up with the money needed to cover projected revenue shortfalls for this fiscal year as well as FY '92. **Revenue projections** released in mid-March show another $24.3 million drop in state revenues for the current budget year as well as a $35.1 million drop for fiscal 1992 forecasts. Members of the **Delaware Economic and Financial Advisory Committee** say drops in corporate income tax and franchise tax collections are the primary culprits for the revenue shortfalls. House Minority Leader Orlando George says money from the State's $64 million rainy day fund will have to be used to cover the shortfall. Other revenue enhancing options brought to the table include raising taxes and the laying off of state workers.

Efforts to bring a **Class A minor league baseball** team to Delaware have been hampered a bit by Delaware Technical and Community College's (DTCC) rejection of a plan to use the school's Stanton site for a **multi-purpose stadium**. In February, DTCC's Board of Trustees voted to reject the stadium plan which was to also include three 200,000-square-foot office buildings. Officials are now looking at downtown **Wilmington** as the possible site for the proposed $9 million stadium. Last fall, developer Joseph Grace Jr. announced plans to bring the "Blue Rocks" to Delaware in April of 1992.

In October the **DuPont** Company announced plans to sell its interest in an optical disc joint venture with **Philips of the Netherlands**. Philips will buy DuPont's interest in the venture which produces optical discs for the information and entertainment industries.

Also in October, **DuPont** signed an agreement with **Merck & Co.** to form the DuPont Merck Pharmaceutical Company. DuPont will contribute its pharmaceutical and radiopharmaceutical imaging agents business to the venture while Merck will provide research and development, marketing rights to several of its prescription medicines, and cash. First year sales are estimated at **$700 million**.

The effect of **slowing car sales** nationwide has hit the First State. According to the Delaware **Division of Motor Vehicles**, 1990 statewide car sales fell 10% below 1989 figures. The news was somewhat better in December as sales were only down 4.5% over December 1989 numbers. Sussex County was hardest hit during the month, with sales down 7.4 percent. New Castle County saw a 5% dip, while Kent County saw a sales increase of 11 cars.

NEW CASTLE COUNTY DEVELOPMENTS

February saw one of the most controversial votes in **New Castle County Council** history as the seven-member council voted 4-3 to approve the $200 million, 1.1 million-square-foot **Brandywine Town Center** Mall to be built on the site of the former Brandywine Raceway. Council President Phil Cloutier predicts a **traffic "catastrophe"** on Concord Pike once con-

struction of the mall is complete. Also approved was a 166,000-square-foot shopping center on the Woodlawn Trustees property across from the Concord Mall.

In October **Widener University** announced the shutdown of undergraduate programs at its Brandywine campus on Concord Pike. The school wants to convert the site into a **"first-of-its-kind" law center**. University officials say current sophomores will graduate as scheduled in May and freshmen will be transferred to the school's main campus in Chester next fall. Under this new plan, the school will expand its adult education program as well as spend $1 million converting campus buildings into the new law center which will bring together law students of all disciplines.

Hercules, Inc. agreed in October to sell units of its Hercules Aircraft and Electronics group to B. F. Goodrich Company for $176 million in cash. Company officials say the move is part of Hercules' long-range plan to focus future business growth on advanced materials and food ingredients and to balance the contribution of core corporate units, including aerospace.

New Castle County is planning to build a 27-acre, $1.1 million park for the growing Bear/Christiana area. The park will be located between Summer Hill and Salem Woods, near Old Baltimore Pike and Walther Road. When finished in four years, the park will serve about 30,000 area residents and include tennis courts, basketball courts, a soccer/football field, a picnic pavilion, and a 198-space parking lot.

The **University of Delaware's College of Agricultural Sciences** has a new dairy nutrition research building that school officials say will help **dairies** in the region become more profitable and competitive. The building, which opened in November, is funded by ICI Americas and will allow for more precise nutritional studies and more information about feeding systems and feed additives.

By the middle of this year, **Delaware's largest movie theater complex** will open at **First State Plaza**. In November, Cinemark, USA, Inc. announced plans to build a 10-screen complex, seating between 200 and 500 moviegoers. The 30,000-square-foot complex will be added to the south end of the shopping center. An earlier plan by Rand Theaters of Little Rock, Arkansas to build theaters at First State Plaza fell through when the company ran into financial difficulty.

What was to be the "Crown Jewel" of the Christina Gateway in Wilmington is now a dream on hold. Developers of the proposed **Towerside Market place** have delayed construction indefinitely due to the downturn in downtown leasing activity. The proposed **$68-million, 54-store center** is already two years behind schedule mainly because of its inability to attract tenants. The city has commitments from 35 retailers, but no signed contracts. Towerside was to be built at Martin Luther King Boulevard between King and French Streets and include a 100,000 square-foot plaza for shops and restaurants, a 400-car underground garage, and two 10-story buildings for a hotel and offices.

Columbia Gas System plans to spend an estimated **$600 million** this year on "aggressive" market growth, oil and gas exploration, and development activities. The company's board of directors approved the expenditures in late December.

KENT COUNTY DEVELOPMENTS

The Delaware State Housing Authority is providing close to $3 million in loans to finance **Commerce Square**, a complex of 80 low-income family housing units in Smyrna. The complex will include 60 two-bedroom townhouses and 20 three-bedroom duplexes. Wilmington-based housing developer Leon Weiner and Associates, Inc. will own the project.

In October, Milford city officials unveiled plans for a new **$1.2 million Milford public library**. Officials say the library, which will be built on the municipal parking lot at the corner of Southeast Front and South Washington Streets, will help revitalize Milford's downtown area.

Delmarva Power and Light Company has donated more than 340 acres of bay front at Port Mahon to **The Nature Conservancy** for use as a wildlife preserve. The land is part of one of the Atlantic Coast's primary feeding sites for migrating shorebirds as they travel form South America to the Arctic in the spring.

The **Kent County AeroPark** in Dover has secured its first major tenant. **Discover Card Services, Inc.,** a business unit of Dean Witter Financial Services Group, plans to hire 120 people for jobs in the company's payment processing office at the park.

Two years and $5 million later, **Delaware Technical and Community College's Terry Campus** has a new **Science and Engineering Technology Center**. The 45,000-square-foot facility houses a computer-aided drafting laboratory, a mathematics laboratory, a robotics laboratory, and a flight simulator room with two single-engine ground simulators where students can learn to fly without getting into an airplane.

SUSSEX COUNTY DEVELOPMENTS

Construction is under way on the final phase of the factory outlet center in **Rehoboth Beach**. The final phase, known as **"Ocean Outlets Seaside,"** will include 84,000 square feet of designer factory stores. Opening is scheduled for May.

Ninety-five people lost their jobs in October when the **North American Housing Corporation**, a modular home manufacturer, closed its doors after six years in the Sussex County Industrial Park.

A Lincoln, Delaware developer has been awarded a **$3.6 million contract** to build a 60-unit affordable housing community in Laurel. **"Wexford Village"** will consist of 48 rental units and 12 for-sale homes. Currently the site is known as Big Mills Run Trailer Park, but aging trailers will be removed and families relocated to make way for the new housing units.

Sussex County Council has adopted a land-use plan calling for bigger home lots, more wetlands protection, and greater freedom to install mobile homes. The **Western Sussex Land Use Plan**, adopted in December, advocates prohibiting strip development along major roads, concentrating major development around incorporated towns, and invalidating development plans that win county approval but aren't implemented properly.

SPECIAL INTEREST ARTICLE

The ***Delaware Career Compass*** is back and better than ever! On February 13th, the Delaware Department of Labor released the 2nd edition of the ***Compass***, a highly successful career planning guide for students and job seekers throughout the State.

The ***Delaware Career Compass*** includes features on Vocational Education, Delaware's future job outlook and workforce readiness, and practical advice on all aspects of career decisionmaking.

The ***Delaware Career Compass*** has been produced by the Delaware Department of Labor's Occupational Information Coordinating Committee under sponsorship from the Delaware Advisory Council on Career and Vocational Education (DACCVE) and the Delaware General Assembly. For copies, call (302) 368-6960.

JOB SERVICE OFFICE RECENT APPLICANTS

Check the following mini-resumes for a match with your company's personnel needs. *

Occupation desired	# of Years Exper.	Other Experience	# of Years Other Exper.	Education (Highest Grade Completed)	Hours Desired / Annual Income Desired	Relocate? / Location of *Applicant
BUILDING MAINTENANCE SUPERVISOR	3	SHIPPING & RECVNG. CLERK	5	14	FULL - TIME / $15 K	NO / NEW CASTLE CO
EMPLOYMENT INTERVIEWER	1	OFFICE MANAGER	10	16; SOME MBA WORK	FULL TIME / $20K	NO / NEW CASTLE CO
WAREHOUSE SUPERVISOR	10	ADM. ASST.	3	16	FULL TIME / $20K	YES / N. CASTLE AREA
ADMINISTRATIVE MANAGEMENT	5			12; SOME COMPUTER COURSES	FULL TIME / $20K	YES / BEAR
ADMINISTRATIVE CLERK	20			12; SOME POSTSEC-ONDARY	FULL TIME / $15K	YES / DOVER.
STATISTICAL DATA BASE SPECIALIST	10			MASTERS DEGREE, EDUCA-TION	FULL TIME / $25K	NO / KENT CO.
PROGRAM MANAGER, MECHANICAL ENGI-NEERING	14			16	FULL TIME / NEGOT.	YES / LAUREL
PLASTICS/FBRGLASS LEAD PERSON	12			13	FULL TIME / NEGOT.	YES / LEWES

* Due to the time lapse between collection of this data and publication of the Digest, these applicants may have already found jobs. These mini-resumes are examples of the types of job-seekers available in Delaware. You may contact the Job Service office in your area for further information: New Castle County, 577-2767; Kent County, 739-5473; Sussex County, 856-5230.

CIVILIAN LABOR FORCE, EMPLOYMENT AND UNEMPLOYMENT

BY PLACE OF RESIDENCE

TABLE 1

(IN THOUSANDS)

AREA	YEAR	CIVILIAN LABOR FORCE			EMPLOYMENT			UNEMPLOYMENT			UNEMPLOYMENT RATE		
		OCT	NOV	DEC	OCT	NOV	DEC	OCT	NOV	DEC	OCT	NOV	DEC
UNITED STATES**	1990	124,784.0	124,616.0	125,174.0	117,711.0	117,261.0	117,574.0	7,073.0	7,355.0	7,600.0	5.7	5.9	6.1
	1989	124,148.0	124,488.0	124,542.0	117,585.0	117,836.0	117,957.0	6,563.0	6,652.0	6,585.0	5.3	5.3	5.3
UNITED STATES***	1990	125,020.0	124,821.0	124,630.0	118,299.0	117,611.0	117,287.0	6,722.0	7,211.0	7,343.0	5.4	5.8	5.9
	1989	124,416.0	124,664.0	123,998.0	118,194.0	118,168.0	117,698.0	6,222.0	6,495.0	6,300.0	5.0	5.2	5.1
DELAWARE***	1990	364.0	363.2	364.8	343.7	339.8	342.8	20.2	23.5	22.0	5.6	6.5	6.0
	1989	362.7	364.5	361.7	349.2	353.6	350.9	13.4	10.9	10.8	3.7	3.0	3.0
WILMINGTON PMSA***	1990	314.9	314.9	315.0	298.0	294.1	296.0	17.0	20.8	19.0	5.4	6.6	6.0
	1989	315.1	316.5	316.9	302.7	306.8	307.6	12.4	9.8	9.2	3.9	3.1	2.9
SURROUNDING STATES:													
NEW JERSEY***	1990	4,068.0	4,052.0	4,034.0	3,848.0	3,843.0	3,807.0	220.0	209.0	227.0	5.4	5.2	5.6
	1989	3,962.0	4,010.0	3,998.0	3,771.0	3,822.0	3,859.0	190.0	188.0	138.0	4.8	4.7	3.5
NEW YORK***	1990	8,623.0	8,569.0	8,564.0	8,623.0	8,117.0	8,098.0	462.0	452.0	466.0	5.4	5.3	5.4
	1989	8,666.0	8,749.0	8,787.0	8,666.0	8,307.0	8,305.0	401.0	442.0	482.0	4.6	5.1	5.5
PENNSYLVANIA***	1990	5,897.0	5,911.0	5,891.0	5,550.0	5,563.0	5,567.0	346.0	347.0	324.0	5.9	5.9	5.0
	1989	5,817.0	5,901.0	5,855.0	5,560.0	5,600.0	5,567.0	257.0	301.0	288.0	4.4	5.1	4.9
MARYLAND***	1990	2,517.9	2,503.0	2,489.0	2,389.0	2,359.9	2,338.2	129.0	143.1	150.8	5.1	5.7	6.1
	1989	2,522.8	2,541.4	2,539.9	2,436.2	2,454.1	2,451.6	86.6	87.3	88.3	3.4	3.4	3.5

** PRELIMINARY* *** SEASONALLY ADJUSTED* **** NONSEASONALLY ADJUSTED*

NOTE: DATA PROVIDED IN CONJUNCTION WITH UNITED STATES DEPT. OF LABOR, BUREAU OF LABOR STATISTICS

DELAWARE NONAGRICULTURAL WAGE & SALARY EMPLOYMENT BY SELECTED INDUSTRY--BY PLACE OF WORK
(IN THOUSANDS)

TABLE-2

INDUSTRY GROUP	1990 OCT	1990 NOV	1990 DEC	1989 OCT	1989 NOV	1989 DEC
TOTAL NONAG. WAGE & SALARY	347.5	343.9	344.9	346.2	349.9	349.8
GOODS PRODUCING	92.9	89.3	89.1	93.1	95.2	94.1
MINING	0.1	0.1	0.1	0.1	0.1	0.1
CONTRACT CONSTRUCTION	20.2	19.8	19.3	21.2	20.8	20.2
GENERAL BLDG. CONT.	5.0	4.9	4.9	5.5	5.4	5.4
HEAVY CONST. CONT.	3.6	3.5	3.2	3.7	3.4	3.1
SPECIAL TRADE CONT.	11.6	11.4	11.2	12.0	12.0	11.7
MANUFACTURING	72.6	69.4	69.7	71.8	74.3	73.8
DURABLE GOODS	18.5	15.4	16.0	17.4	19.7	19.7
PRIMARY & FABRICATED METALS	3.2	3.2	3.3	3.4	3.4	3.4
MACHINERY & ELECTRICAL EQUIP.	1.8	1.8	1.8	1.9	1.9	1.9
TRANSPORTATION EQUIP.	7.8	4.9	5.4	5.9	8.2	8.2
INSTRUMENTS & RELATED	3.0	3.0	3.0	3.2	3.2	3.2
OTHER DURABLE GOODS	2.7	2.5	2.5	3.0	3.0	3.0
NONDURABLE GOODS	54.1	54.0	53.7	54.4	54.6	54.1
FOOD & KINDRED PROD.	9.4	9.4	9.3	9.4	9.2	9.1
TEXTILE, APPAREL, LEATHER	1.5	1.5	1.6	1.5	1.6	1.6
PAPER, PRINTING, PUBLISHING	5.2	5.2	5.1	5.4	5.4	5.2
CHEMICALS	34.0	34.0	33.8	34.0	34.3	34.2
PETROLEUM, COAL, PLASTICS	4.0	3.9	3.9	4.1	4.1	4.0
SERVICE PRODUCING	254.6	254.6	255.8	252.1	254.7	255.7
TRANSPORTATION & PUB. UTILITIES	15.4	15.3	15.7	15.7	15.9	16.1
TRANSPORTATION	10.2	10.1	10.5	10.5	10.7	10.9
RAILROAD TRANSPORT.	1.4	1.4	1.4	1.4	1.4	1.4
LOCAL & INTERURBAN PASS.	1.8	1.7	1.7	1.7	1.8	1.8
TRUCKING & WAREHOUSING	4.9	4.8	4.8	5.0	4.9	5.1
OTHER TRANSPORTATION	2.3	2.2	2.6	2.4	2.6	2.6
COMMUNICATIONS & UTIL.	5.2	5.2	5.2	5.2	5.2	5.2
COMMUNICATIONS	2.2	2.2	2.2	2.2	2.2	2.2
ELECTRIC, GAS & SANITARY SERV.	3.0	3.0	3.0	3.0	3.0	3.0
WHOLESALE & RETAIL TRADE	75.7	76.3	77.4	75.4	77.0	78.0
WHOLESALE TRADE	13.5	13.6	13.6	13.4	13.4	13.4
WHOLESALE-DURABLES	7.7	7.8	7.8	7.7	7.7	7.7
WHOLESALE-NONDURABLES	5.8	5.8	5.8	5.7	5.7	5.7
RETAIL TRADE	62.2	62.7	63.8	62.0	63.6	64.6
BLDG. MATERIAL & GARDEN SUP.	2.9	2.8	2.8	2.8	2.8	2.8
GENERAL MERCH. STORES	8.9	9.7	10.1	9.5	10.5	11.4
FOOD STORES	9.6	9.7	9.9	9.6	9.8	9.5
AUTO DEALERS & SERVICE STATIONS	6.7	6.7	6.7	6.7	6.7	6.7
APPAREL & ACCESSORY STORES	3.5	3.6	3.8	3.4	3.6	3.7
FURNITURE & HOME FURNISHINGS	2.6	2.6	2.8	2.7	2.7	2.8
EATING & DRINKING PLACES	19.4	18.8	18.7	18.7	18.6	18.6
MISCELLANEOUS RETAIL	8.6	8.8	9.0	8.6	8.9	9.1
FINANCE, INSURANCE & REAL ESTATE	31.9	31.9	31.8	30.7	30.7	30.9
FINANCE	22.9	22.9	22.9	21.6	21.7	21.9
DEPOSITORY INSTITUTIONS	20.0	20.0	20.0	18.6	18.7	18.9
OTHER FINANCE	2.9	2.9	2.9	3.0	3.0	3.0
INSURANCE	5.6	5.8	5.6	5.8	5.6	5.6
REAL ESTATE	3.4	3.4	3.3	3.5	3.4	3.4
SERVICES	85.4	84.5	84.4	82.8	82.8	83.1
HOTEL & LODGING	3.2	3.1	3.0	3.1	2.9	2.9
PERSONAL SERVICES	3.1	3.0	3.2	3.0	3.0	3.0
BUSINESS SERVICES	21.1	20.6	20.4	20.1	20.0	20.3
AUTOMOBILE & MISC. REPAIR	3.8	3.8	3.8	3.8	3.9	3.9
AMUSEMENT & RECREATION SERVICES	3.6	3.2	3.2	3.2	3.2	2.8
HEALTH SERVICES	22.5	22.6	22.4	21.8	21.9	22.2
HOSPITALS	11.3	11.4	11.2	10.9	10.9	10.9
OTHER HEALTH SERV.	11.2	11.2	11.2	10.9	11.0	11.3
LEGAL SERVICES	2.7	2.7	2.8	2.7	2.8	2.8
EDUCATIONAL SERVICES	4.0	4.0	4.0	4.0	4.0	4.0
SOCIAL SERVICES	6.7	6.8	6.8	6.7	6.7	6.6
ENGINEERING & MANAGEMENT	5.8	5.8	5.7	5.9	6.0	6.1
MEMBERSHIP ORGNIZATIONS	5.5	5.5	5.6	5.1	5.1	5.3
OTHER SERVICES	3.8	3.6	3.5	3.4	3.3	3.2
GOVERNMENT	46.2	46.6	46.5	47.5	48.3	47.6
FEDERAL GOVERNMENT	5.8	5.8	5.8	5.8	5.8	5.9
STATE & LOCAL GOVERNMENT	40.4	40.8	40.7	41.7	42.5	41.7
STATE GOVERNMENT	23.5	23.4	23.3	24.2	24.5	23.6
STATE EDUCATION	9.1	9.0	9.0	10.2	10.5	9.7
STATE NON-EDUCATION	14.4	14.4	14.3	14.0	14.0	13.9
LOCAL GOVERNMENT	16.9	17.4	17.4	17.5	18.0	18.1
LOCAL EDUCATION	12.7	13.2	13.2	12.7	13.2	13.2
LOCAL NON-EDUCATION	4.2	4.2	4.2	4.8	4.8	4.9
PERSONS INVOLVED IN WORK STOPPAGES	0.1	0.0	0.0	0.0	0.0	0.0

WILMINGTON PMSA NONAGRICULTURAL WAGE & SALARY EMPLOYMENT BY SELECTED INDUSTRY--BY PLACE OF WORK
(IN THOUSANDS)

TABLE-2A INDUSTRY GROUP	1990 OCT	1990 NOV	1990 DEC	1989 OCT	1989 NOV	1989 DEC
TOTAL NONAG. WAGE & SALARY	301.0	297.8	298.1	298.1	301.9	301.5
GOODS PRODUCING	80.8	76.7	76.7	80.2	82.9	81.6
MINING	0.2	0.2	0.2	0.2	0.2	0.2
CONTRACT CONSTRUCTION	18.1	17.4	17.0	19.2	19.0	18.1
GENERAL BLDG. CONT.	4.4	4.1	4.1	4.7	4.7	4.7
HEAVY CONST. CONT.	4.0	3.9	3.7	4.4	4.2	3.7
SPECIAL TRADE CONT.	9.7	9.4	9.2	10.1	10.1	9.7
MANUFACTURING	62.9	59.1	59.5	60.8	63.7	63.3
DURABLE GOODS	17.9	14.8	15.4	16.2	18.8	18.6
PRIMARY & FABRICATED METALS	2.8	2.8	2.9	2.8	2.8	2.8
MACHINERY & ELECTRICAL EQUIP.	2.0	2.0	2.0	2.2	2.2	2.1
TRANSPORTATION EQUIP.	8.3	5.3	5.8	6.2	8.8	8.7
INSTRUMENTS & RELATED	2.6	2.6	2.6	2.8	2.8	2.8
OTHER DURABLE GOODS	2.2	2.1	2.1	2.2	2.2	2.2
NONDURABLE GOODS	44.4	44.3	44.1	44.6	44.9	44.7
FOOD & KINDRED PROD.	0.8	0.8	0.8	0.8	0.8	0.8
TEXTILE, APPAREL, LEATHER	1.3	1.3	1.3	1.3	1.3	1.4
PAPER, PRINTING, PUBLISHING	2.8	2.8	2.8	3.0	3.0	2.8
CHEMICALS	34.9	34.9	34.7	34.9	35.2	35.1
PETROLEUM, COAL, PLASTICS	4.6	4.5	4.5	4.6	4.6	4.6
SERVICE PRODUCING	220.4	220.9	221.4	215.9	219.0	219.9
TRANSPORTATION & PUB. UTILITIES	16.7	16.9	17.2	16.7	16.9	16.9
TRANSPORTATION	10.0	10.0	10.2	10.0	10.2	10.3
RAILROAD TRANSPORT.	1.5	1.5	1.5	1.4	1.4	1.4
LOCAL & INTERURBAN PASS.	1.5	1.5	1.5	1.5	1.5	1.5
TRUCKING & WAREHOUSING	4.7	4.7	4.7	4.8	4.8	4.9
OTHER TRANSPORTATION	2.3	2.3	2.5	2.3	2.5	2.5
COMMUNICATIONS & UTIL.	6.7	6.9	7.0	6.7	6.7	6.6
COMMUNICATIONS	1.7	1.7	1.8	1.7	1.7	1.7
ELECTRIC, GAS & SANITARY SERV.	5.0	5.2	5.2	5.0	5.0	4.9
WHOLESALE & RETAIL TRADE	61.7	62.6	63.2	61.5	63.2	64.0
WHOLESALE TRADE	11.7	11.7	11.7	11.5	11.6	11.5
WHOLESALE-DURABLES	6.5	6.5	6.5	6.4	6.5	6.5
WHOLESALE-NONDURABLES	5.2	5.2	5.2	5.1	5.1	5.0
RETAIL TRADE	50.0	50.9	51.5	50.0	51.6	52.5
BLDG. MATERIAL & GARDEN SUP.	1.8	1.8	1.8	1.8	1.8	1.8
GENERAL MERCH. STORES	7.8	8.3	8.6	7.6	8.5	9.1
FOOD STORES	7.5	7.6	7.8	7.6	7.8	7.7
AUTO DEALERS & SERVICE STATIONS	5.9	5.8	5.8	5.9	5.9	5.9
APPAREL & ACCESSORY STORES	2.5	2.7	2.8	2.8	2.8	2.9
FURNITURE & HOME FURNISHINGS	2.0	2.1	2.1	2.2	2.2	2.2
EATING & DRINKING PLACES	15.5	15.3	15.0	15.2	15.2	15.2
MISCELLANEOUS RETAIL	7.0	7.3	7.6	7.1	7.4	7.7
FINANCE, INSURANCE & REAL ESTATE	28.7	28.6	28.7	27.2	27.4	27.6
FINANCE	20.9	20.9	21.0	19.4	19.6	19.8
DEPOSITORY INSTITUTIONS	17.9	17.9	17.9	16.3	16.5	16.6
OTHER FINANCE	3.0	3.0	3.1	3.1	3.1	3.2
INSURANCE	5.3	5.3	5.3	5.3	5.3	5.3
REAL ESTATE	2.5	2.4	2.4	2.5	2.5	2.5
SERVICES	76.3	75.6	75.3	73.1	73.4	73.7
HOTEL & LODGING	2.4	2.4	2.4	2.4	2.5	2.5
PERSONAL SERVICES	2.5	2.5	2.6	2.4	2.4	2.4
BUSINESS SERVICES	19.4	19.2	18.9	18.1	18.1	18.4
AUTOMOBILE & MISC. REPAIR	3.3	3.3	3.3	3.4	3.4	3.5
AMUSEMENT & RECREATION SERVICES	3.1	2.6	2.5	2.7	2.6	2.2
HEALTH SERVICES	20.0	20.2	20.1	19.4	19.5	19.7
HOSPITALS	9.8	9.9	9.9	9.6	9.6	9.6
OTHER HEALTH SERV.	10.2	10.3	10.2	9.8	9.9	10.1
LEGAL SERVICES	2.6	2.6	2.6	2.5	2.5	2.5
EDUCATIONAL SERVICES	3.8	3.8	3.8	3.7	3.7	3.7
SOCIAL SERVICES	5.8	5.8	5.9	5.5	5.6	5.6
ENGINEERING & MANAGEMENT	5.4	5.3	5.3	5.5	5.6	5.7
MEMBERSHIP ORGNIZATIONS	4.9	4.9	5.0	4.6	4.6	4.7
OTHER SERVICES	3.1	3.0	2.9	2.9	2.9	2.8
GOVERNMENT	37.0	37.2	37.0	37.4	38.1	37.7
FEDERAL GOVERNMENT	5.0	5.0	5.0	4.8	4.8	4.8
STATE & LOCAL GOVERNMENT	32.0	32.2	32.0	32.6	33.3	32.9
STATE GOVERNMENT	14.8	14.6	14.5	15.5	15.8	15.2
STATE EDUCATION	7.8	7.4	7.4	8.6	8.8	8.2
STATE NON-EDUCATION	7.2	7.2	7.1	6.9	7.0	7.0
LOCAL GOVERNMENT	17.2	17.6	17.5	17.1	17.5	17.7
LOCAL EDUCATION	11.7	12.1	12.0	11.7	12.1	12.2
LOCAL NON-EDUCATION	5.5	5.5	5.5	5.4	5.4	5.5
PERSONS INVOLVED IN WORK STOPPAGES	0.1	0.0	0.0	0.0	0.0	0.0

WILMINGTON PRIMARY METROPOLITAN STATISTICAL AREA (PMSA)

	WEEKLY EARNINGS			WEEKLY HOURS			HOURLY EARNINGS		
	OCT	NOV	DEC	OCT	NOV	DEC	OCT	NOV	DEC
				1990					
MANUFACTURING	$ 607.75	$ 588.41	$ 592.63	41.4	42.7	43.1	$ 14.68	$ 13.78	$13.75
DURABLE GOODS	592.81	676.45	602.19	40.3	42.7	42.2	14.71	13.50	14.27
PRIMARY & FAB. METALS	412.34	439.56	451.25	38.9	39.6	40.8	10.60	11.10	11.06
MACHINERY	505.79	672.58	557.14	39.3	49.6	41.3	12.87	13.56	13.49
TRANSPORTATION EQUIP.	665.85	607.68	681.38	40.7	42.2	42.8	16.36	14.40	15.92
INSTRUMENTS & RELATED	392.02	398.01	405.77	34.0	34.7	35.5	11.53	11.47	11.43
OTHER DURABLE GOODS	609.90	642.05	627.83	44.1	45.6	45.2	13.83	14.08	13.89
NONDURABLE GOODS	622.63	598.65	582.12	42.5	42.7	44.1	14.65	14.02	13.20
FOOD & KINDRED	388.83	444.98	464.86	41.9	42.5	39.8	9.28	10.47	11.68
TEXTILE & APPAREL	374.52	379.44	397.80	39.8	40.8	40.8	9.41	9.30	9.75
PAPER, PRINTING, PUBLISH.	487.51	450.86	427.06	36.3	38.8	37.2	13.43	11.62	11.48
CHEMICALS	741.76	753.54	769.12	44.1	44.3	46.0	16.82	17.01	16.72
RUBBER & PLASTICS	464.77	453.90	533.85	42.6	42.5	48.4	10.91	10.68	11.03
				1989					
MANUFACTURING	$ 651.89	$ 638.12	$ 657.92	43.2	43.0	43.6	$ 15.09	$ 14.84	$ 15.09
DURABLE GOODS	523.38	527.22	567.75	39.0	39.7	39.4	13.42	13.28	14.41
PRIMARY & FAB. METALS	357.00	358.88	374.37	37.5	37.5	39.7	9.52	9.57	9.43
MACHINERY	490.18	524.02	552.34	41.4	43.2	44.4	11.84	12.13	12.44
TRANSPORTATION EQUIP.	637.88	588.32	651.41	40.5	39.3	39.1	15.75	14.97	16.66
INSTRUMENTS & RELATED	342.30	393.42	376.07	32.6	39.5	36.3	10.50	9.96	10.36
OTHER DURABLE GOODS	528.02	559.91	535.44	39.2	41.2	38.8	13.47	13.59	13.80
NONDURABLE GOODS	694.87	682.22	696.44	44.6	44.3	45.4	15.58	15.40	15.34
FOOD & KINDRED	314.36	320.32	320.32	43.3	44.8	43.7	7.26	7.15	7.33
TEXTILE & APPAREL	366.13	376.62	375.53	41.0	41.8	42.1	8.93	9.01	8.92
PAPER, PRINTING, PUBLISH.	429.74	419.93	437.41	40.2	39.1	39.3	10.69	10.74	11.13
CHEMICALS	759.40	747.74	759.10	45.5	45.4	46.4	16.69	16.47	16.36
RUBBER & PLASTICS	445.13	418.26	452.10	40.8	38.8	41.1	10.91	10.78	11.00

NOTE: MOST RECENT MONTH IS PRELIMINIARY DATA.

AVERAGE HOURLY AND WEEKLY EARNINGS AND HOURS WORKED BY PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRY GROUPS

TABLE-3

DELAWARE

	WEEKLY EARNINGS			WEEKLY HOURS			HOURLY EARNINGS		
	OCT	NOV	DEC	OCT	NOV	DEC	OCT	NOV	DEC
				1990					
MANUFACTURING	$ 498.56	$ 470.50	$ 477.25	41.0	41.2	41.5	$ 12.16	$ 11.42	$11.50
DURABLE GOODS	536.45	502.25	533.75	39.3	40.8	40.9	13.65	12.31	13.05
PRIMARY & FAB. METALS	396.81	421.73	446.80	37.4	38.2	40.0	10.61	11.04	11.17
MACHINERY	533.65	680.04	564.28	39.5	49.1	41.4	13.51	13.85	13.63
TRANSPORTATION EQUIP.	664.22	605.99	674.10	40.7	42.2	42.8	16.32	14.36	15.75
INSTRUMENTS & RELATED	363.13	353.42	367.43	39.6	39.4	40.6	9.17	8.97	9.05
OTHER DURABLE GOODS	344.93	342.67	362.18	36.5	36.3	37.3	9.45	9.44	9.71
NONDURABLE GOODS	475.86	455.67	443.50	42.0	41.5	41.8	11.33	10.98	10.61
FOOD & KINDRED	337.43	327.22	323.56	41.2	40.1	39.7	8.19	8.16	8.15
TEXTILE & APPAREL	356.59	363.08	380.38	40.8	41.4	41.8	8.74	8.77	9.10
PAPER, PRINTING, PUBLISH.	442.74	401.30	429.55	38.6	37.4	40.6	11.47	10.73	10.58
CHEMICALS	629.58	637.87	626.08	43.6	43.9	43.0	14.44	14.53	14.56
PETROLEUM & PLASTICS	461.17	464.28	517.19	43.1	43.8	48.2	10.70	10.60	10.73
				1989					
MANUFACTURING	$ 508.77	$ 509.23	$ 523.24	41.6	41.3	41.2	$ 12.23	$ 12.33	$ 12.70
DURABLE GOODS	480.39	480.15	512.44	39.8	39.1	38.5	12.07	12.28	13.31
PRIMARY & FAB. METALS	351.50	364.18	361.13	36.5	37.7	37.5	9.63	9.66	9.63
MACHINERY	514.59	545.93	568.37	41.6	43.5	44.3	12.37	12.55	12.83
TRANSPORTATION EQUIP.	635.85	585.96	649.45	40.5	39.3	39.1	15.70	14.91	16.61
INSTRUMENTS & RELATED	359.86	374.92	367.94	39.2	39.3	40.3	9.18	9.54	9.13
OTHER DURABLE GOODS	350.58	332.68	301.92	41.1	38.0	34.0	8.53	8.76	8.88
NONDURABLE GOODS	516.99	519.51	528.33	42.1	42.1	42.3	12.28	12.34	12.49
FOOD & KINDRED	316.01	319.18	339.77	39.9	39.6	39.6	7.92	8.06	8.58
TEXTILE & APPAREL	355.14	366.78	365.05	41.2	42.5	42.3	8.62	8.63	8.63
PAPER, PRINTING, PUBLISH.	368.83	412.38	370.39	38.3	39.5	36.1	9.63	10.44	10.26
CHEMICALS	634.66	626.97	637.92	43.8	43.6	44.3	14.49	14.38	14.40
RUBBER & PLASTICS	431.58	414.09	440.43	40.6	39.4	41.2	10.63	10.51	10.69

NUMBER AND AMOUNT OF UNEMPLOYMENT COMPENSATION PAYMENTS
FOR REGULAR U.I. PROGRAM BY AREA/LOCAL OFFICE

TABLE 4

AREA AND OFFICE	OCTOBER	NOVEMBER	DECEMBER	OCTOBER	NOVEMBER	DECEMBER
	WEEKS COMPENSATED			AMT. OF PAYMENT (000')		
STATE TOTALS *	16,055	24,537	27,154	2,738,844	4,399,824	4,734,025
NEW CASTLE COUNTY/	8,684	15,688	16,549	1,526,296	3,023,091	3,085,067
WILMINGTON L.O.	5,561	11,871	11,860	954,502	2,326,046	2,246,612
NEWARK L.O.	3,123	3,817	4,689	571,794	697,045	838,455
KENT COUNTY/ DOVER L.O.	2,155	2,546	2,949	341,494	388,307	452,330
SUSSEX COUNTY/ GEORGETOWN L.O.	2,391	3,399	4,073	365,108	460,607	563,746
	AVERAGE WEEKLY BENEFIT AMOUNT			NUMBER OF U.I. FIRST PAYMENTS		
STATE TOTALS *	179	188	195	1,357	2,476	1,756
NEW CASTLE COUNTY/	183	198	192	696	1,769	897
WILMINGTON L.O.	179	201	195	423	1,424	536
NEWARK L.O.	191	191	186	273	345	361
KENT COUNTY/ DOVER L.O.	165	159	164	201	257	243
SUSSEX COUNTY/ GEORGETOWN L.O.	164	154	153	276	245	386

* INCLUDES INTERSTATE LIABLE PAYMENTS WHICH ARE NOT AGGREGATED IN THE AREA/LOCAL OFFICE TOTALS
SOURCE: DELAWARE DEPARTMENT OF LABOR, UNEMPLOYMENT INSURANCE AUTOMATED DATA SYSTEM

DELAWARE U.I. REGULAR CONTINUED CLAIM COUNTS

TABLE-5

	1990			1989		
	FOR THE WEEK INCLUDING THE 12TH OF					
	OCTOBER	NOVEMBER	DECEMBER	OCTOBER	NOVEMBER	DECEMBER
TOTAL COUNT	4,000	6,600	8,300	5,700	3,600	4,500
NUMBER OF AUTO INDUSTRY	0	2,200	2,100	2,600	200	0
TOTAL LESS AUTO INDUSTRY	4,000	4,400	6,200	3,100	3,400	4,500
	FOR THE MONTHS OF					
	OCTOBER	NOVEMBER	DECEMBER	OCTOBER	NOVEMBER	DECEMBER
TOTAL COUNT	18,100	26,800	29,900	19,500	18,100	18,300
NUMBER OF AUTO INDUSTRY	0	5,800	4,700	6,000	3,000	1,500
TOTAL LESS AUTO INDUSTRY	18,100	21,000	25,200	12,500	15,100	16,800

NOTE: DETAIL MAY NOT ADD TO TOTALS DUE TO ROUNDING

SOURCE: DERIVED FROM WEEKLY LOCAL OFFICE REPORTS OF U.I. CLAIMS-TAKING ACTIVITIES

CONSUMER PRICE INDEX AND PERCENT CHANGES FOR ALL URBAN CONSUMERS
PHILADELPHIA AREA

TABLE-6

EXPENDITURE CATEGORY	1990 OCT	1990 NOV	1990 DEC	1989 OCT	1989 NOV	1989 DEC
ALL ITEMS (1982-84=100)	138.8	139.1	139.4	130.5	130.1	129.9
FOOD & BEVERAGES	132.5	132.5	133.6	127.0	127.4	127.7
HOUSING	141.1	141.1	141.3	132.9	131.9	132.7
APPAREL & UPKEEP	105.1	101.9	100.6	97.8	95.8	92.0
TRANSPORTATION	132.1	133.8	134.5	123.4	123.0	123.1
MEDICAL	171.5	174.3	174.6	164.1	166.1	159.8
ENTERTAINMENT	133.7	134.5	134.1	130.3	129.7	130.1
OTHER GOODS & SERVICES	178.5	178.7	179.0	158.0	159.2	158.4
	PERCENT CHANGE FROM PREVIOUS MONTH AND YEAR AGO					
ALL ITEMS						
MONTHLY	0.4	0.2	0.2	0.2	-0.3	-0.2
YEARLY	6.4	6.9	7.3	4.7	3.8	3.4
	UNITED STATES					
ALL ITEMS						
INDEX (1982-84=100)	133.5	133.8	133.8	125.6	125.9	126.1
MO. CHANGE (%)	0.6	0.2	0.0	0.5	0.2	0.2
YR. CHANGE (%)	6.3	6.3	6.1	4.5	4.7	4.6

SOURCE: U.S. DEPARTMENT OF LABOR, BUREAU OF LABOR STATISTICS

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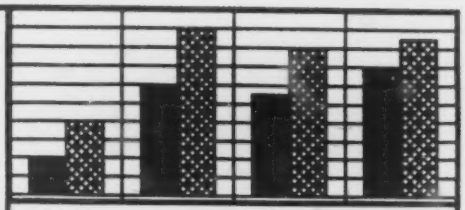
Delaware Digest

Labor Market Monthly

Volume 1, No. 1 May, 1991

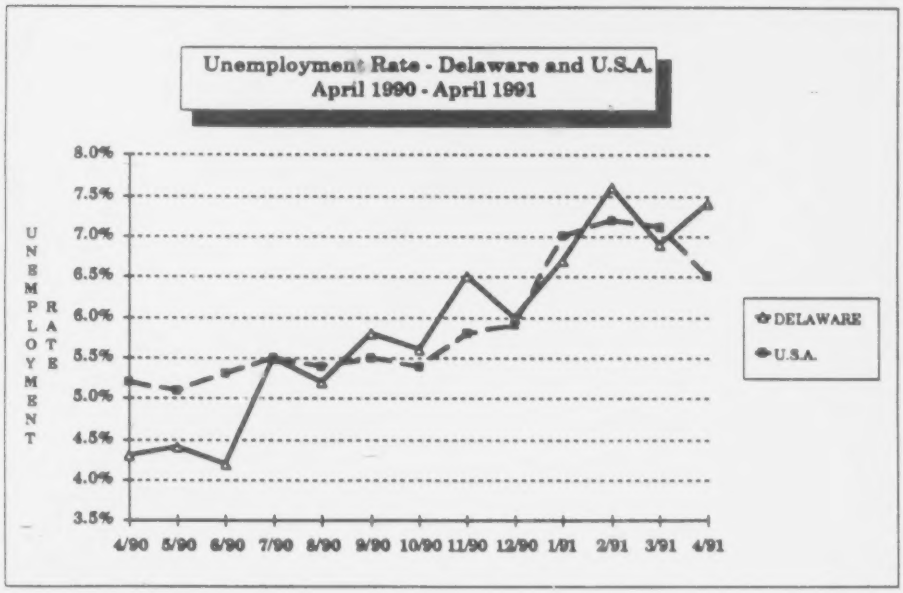


Delaware Department of Labor
Office of Occupational & Labor Market Information

Temporary Auto Layoffs Spur April Unemployment Rate

Delaware's unemployment rate rose to 7.4% in April 1991 from 6.9% in March 1991 due mostly to temporary layoffs in the auto industry. The rate in April 1990 was lower at 4.3 percent. The number of jobless Delawareans in April 1991 was 26,700 compared to 15,500 during the same month last year. From April 1990 to April 1991, the State labor force rose slightly from 359,600 to 363,300.

Total nonagricultural employment decreased by 5,000 over the month to 336,600 jobs. Monthly job losses were primarily in **manufacturing** (transportation equipment). Over-the-month job gains were in **contract construction** (heavy construction; and special trades) and **retail trade** (seasonal increase in eating and drinking places).



The Delaware Digest: Labor Market Monthly replaces the quarterly ***Delaware Digest*** and the ***Delaware Monthly Labor Report***. It includes up-to-date employment and unemployment statistics with each issue highlighting an important part of Delaware's Labor Market.

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Labor Force Trends

Since the beginning of 1991, temporary layoffs at Delaware's two auto assembly plants have driven the State's jobless rate higher. This was the story in April as unemployment in Delaware rose to 7.4%, compared to 6.9% in March. The March rate was lower due to a recall of the same auto workers who had been laid off in February. This "in again, out again" movement of workers is credited to production cutbacks due to high inventories and slow car sales nationally. As a result, employment at both Delaware auto assembly plants has fluctuated and will continue to do so in the coming months. In addition auto parts suppliers and several trucking firms (automobile haulers) who directly serve the auto plants have been impacted as well.

In April of 1990, Delaware's unemployment rate was much lower at 4.3 percent. Since the same period a year ago, Delaware, as well as a majority of the states have been faced with higher unemployment. Only six states (Louisiana, Wyoming, Arizona, Utah, North Dakota, and Hawaii) have reported lower rates this Spring compared to a year ago. Mid-Atlantic and New England states, especially Massachusetts, Maine, Rhode Island, and Pennsylvania, continue to be among the hardest hit by the recession. Nationally, April's unemployment rate was 6.5%, marking the sixth time in the past eight months that Delaware's rate was higher than the U.S rate.

From April 1990 to April 1991, the number of Delaware residents working or actively seeking work (civilian labor force) rose slightly from 359,600 to 363,300. The estimate of employed residents is down since April of last year from 344,200 to 336,600. The number of jobless Delawareans in April 1991 was 26,700 compared to 15,500 during the same month last year.

For the months to come, expect continued fluctuation in auto industry employment with a resulting roller coaster effect on the unemployment rate. In April both plants were closed, while in May they reopened. However, temporary layoffs will occur later this summer as General Motors and Chrysler plan retooling projects, continuing employment volatility in this industry. Despite reports that major automakers may shut down plants throughout the country, the long-term outlook for Delaware's plants looks good, considering recent multi-million dollar high-technology facility improvements by Chrysler and General Motors.

Even though reports by many economists may indicate the beginnings of a gradual economic recovery sometime this summer, employers tend to be skeptical until economic expansion is assured. This may cause employers to limit seasonal hiring in the spring and summer, therefore curtailing job opportunities for students. Also, the job market for recent high school and college graduates will be tighter than normal, causing upward pressure on the number of unemployed job seekers this year. Therefore, lack of hiring, coupled with temporary auto industry layoffs over the next several months, will cause the unemployment rate to remain at relatively high levels.

Delaware's Civilian Labor Force

	April 1991	March 1991	April 1990
Civilian Labor Force	363,297	365,625	359,625
Employment	336,588	340,459	344,168
Unemployment	26,709	25,166	15,457
Unemployment Rate	7.4	6.9	4.3
National Unemployment Rate	6.5	7.1	5.2

Local Area Unemployment Statistics

April 1991 - Preliminary

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide (1)	363,297	336,588	26,709	7.4
2. Wilmington, PMSA (3)	316,460	291,101	25,359	8.0
3. New Castle County (2)	248,386	228,879	19,507	7.9
4. Balance of NCC (3)	213,949	197,903	16,046	7.5
5. Wilmington City (3)	34,437	30,976	3,461	10.1
6. Newark City (3)	13,571	12,781	790	5.8
7. Kent County (2)	52,370	48,450	3,920	7.5
8. Sussex County (2)	62,541	59,259	3,282	5.2
9. United States (Non-Seasonal) (6)	124,727	116,678	8,049	6.5
10. United States (000's) (5)	125,672	117,398	8,274	6.6

March 1991 - Final

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide (1)	365,625	340,459	25,166	6.9
2. Wilmington, PMSA (3)	317,128	296,497	20,631	6.5
3. New Castle County (2)	249,513	233,733	15,780	6.3
4. Balance of NCC (3)	214,756	202,100	12,656	5.9
5. Wilmington City (3)	34,757	31,633	3,124	9.0
6. Newark City (3)	14,312	13,052	1,260	8.8
7. Kent County (2)	52,985	48,414	4,571	8.6
8. Sussex County (2)	63,127	58,312	4,815	7.6
9. United States (Non-Seasonal) (6)	124,443	115,639	8,804	7.1
10. United States (000's) (5)	125,326	116,754	8,572	6.8

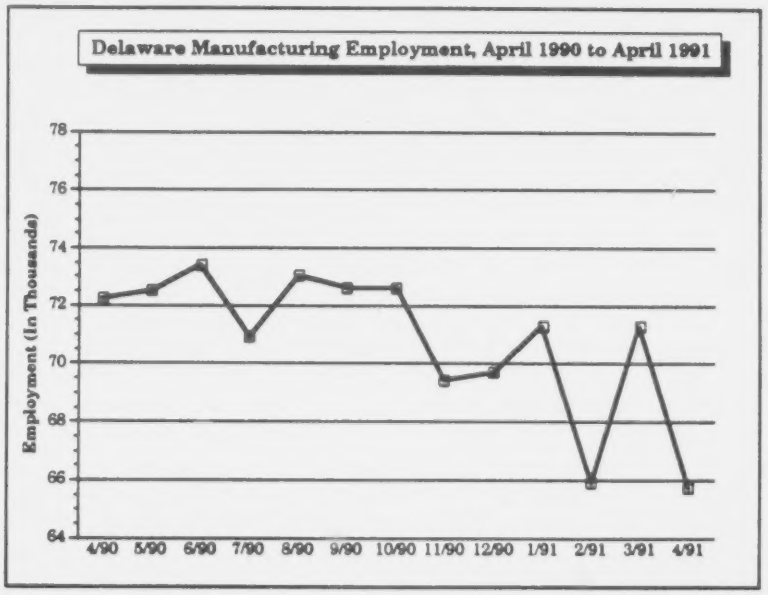
(1) Regression Analysis
(2) Handbook Share
(3) Population-Claims Disaggregation
(4) Census Share
(5) Seasonally Adjusted
(6) Current Population Survey

NOTE: Due to rounding, totals may not add and data may not match similar statistics published in various other state or National releases.

Industry Trends

Between March and April of this year, Delaware's nonagricultural employment declined by 5,000 to 336,600 jobs. **Manufacturing** saw the biggest drop with the temporary layoff of 5,500 auto workers in the transportation equipment industry. Discounting the effect of the auto industry, there would have been a slight gain of about 500 jobs. Typically, there is a large increase in jobs between March and April, mainly due to seasonal hiring. Over the past eight years, the March-to-April gain has averaged 4,700 jobs. This year, however, March to April gains were minimal and seen mainly in **contract construction** (heavy construction and special trades) and **retail trade** (seasonal increase in eating and drinking places).

Total nonagricultural employment has declined by 10,300 since April 1990. Job losses since April of last year have been in **manufacturing** (transportation equipment; chemicals; and miscellaneous durable goods); **government** (state education; and local non-education); **contract construction** (general building; and special trades); **wholesale and retail trade** (general merchandise stores); and **services** (business services; and engineering and management services). Over the year, employment gains have been in **finance, insurance and real estate** (banking).

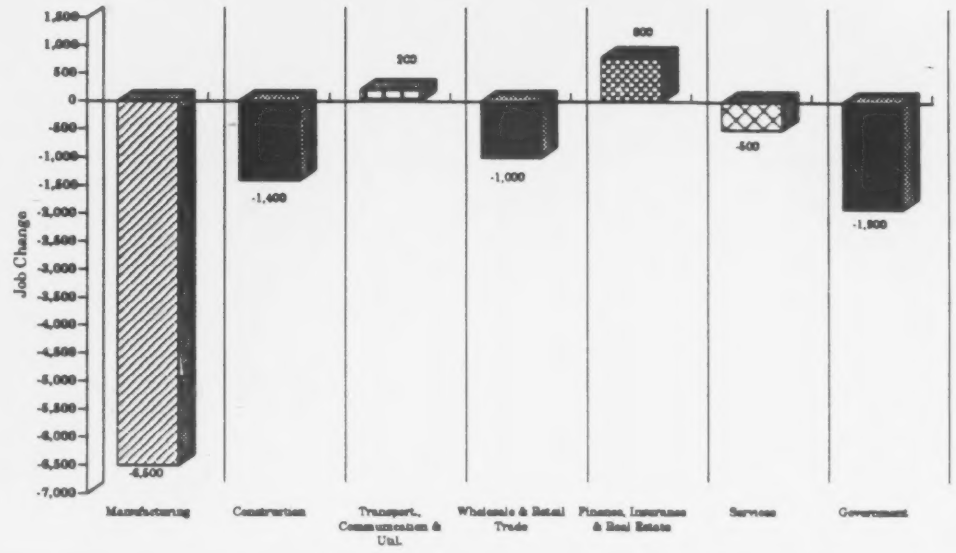


Despite some optimistic signs in the housing market, a quick end to the effects of the recession seems remote. Even if the recession ends this summer, as many economists predict, the labor market will be slow to recover. Signs of significant job growth won't be seen immediately because employers are always conservative in hiring until well after an economic recovery begins.

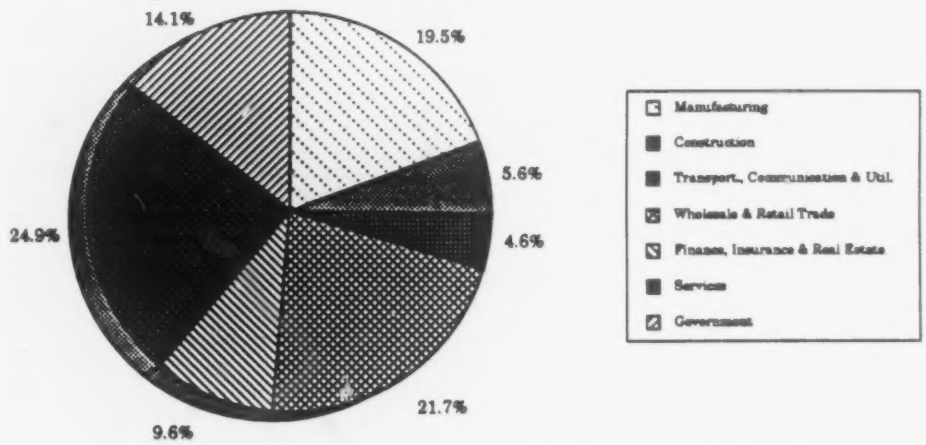
Unlike past recessions the service producing sector has been hard hit. After years of rapid growth, overall service employment in Delaware has declined by nearly ten percent. Business services has lost 800 jobs over the year. The service area was once thought to be recession-proof, but this can no longer supported. A few areas, such has the health field, will continue to be stable or recession resistant, but growth will be slower than normal.

Over the next several months, the Delaware Department of Labor anticipates little, if any, job growth. Some seasonal gains are expected in **retail trade** (especially at the resorts); **food processing**; and **amusement and recreational services**. However, we expect employers to hire fewer seasonal workers than in past years. On the other hand, the auto industry continues to be plagued by slow sales and temporary layoffs (model changeovers are scheduled this summer). There appears to be no specific industry in the private sector that will drive job growth while budget constraints will continue to limit growth in the government sector. Since 1985, growth in State government employment has been only about one-half that of the private sector. This trend is expected to continue.

Net Job Change By Sector, Delaware April 1990 To April 1991



Percent Of Total Employment By Sector, Delaware, April 1991



Delaware Nonagricultural Employment by Selected Industry

INDUSTRY GROUP	Apr 91	Mar 91	Apr 90	Net Change From Mar 91	Net Change From Apr 90
TOTAL NONAG. EMPLOYMENT	336.6	341.6	346.9	-5.0	-10.3
GOODS PRODUCING	84.7	89.6	92.6	-4.9	-7.9
MINING	0.1	0.1	0.1	0.0	0.0
CONTRACT CONSTRUCTION	18.9	18.2	20.3	0.7	-1.4
General Building Contractors	4.6	4.7	5.1	-0.1	-0.5
Heavy Construction Contractors	3.7	3.1	3.4	0.6	0.3
Special Trade Contractors	10.6	10.4	11.8	0.2	-1.2
MANUFACTURING	65.7	71.3	72.2	-5.6	-6.5
Durable Goods	12.9	18.5	18.8	-5.6	-5.9
Primary & Fabricated Metals	3.2	3.2	3.3	0.0	-0.1
Machinery & Electrical Equipment	1.8	1.8	1.8	0.0	0.0
Transportation Equipment	2.5	8.0	7.7	-5.5	-5.2
Instruments & Related Products	3.0	3.0	3.1	0.0	-0.1
Other Durable Goods	2.4	2.5	2.9	-0.1	-0.5
Nondurable Goods	52.8	52.8	53.4	0.0	-0.6
Food & Kindred Products	8.8	8.8	8.6	0.0	0.2
Textile, Apparel, Leather	1.5	1.5	1.5	0.0	0.0
Paper, Printing, Publishing	5.1	5.1	5.2	0.0	-0.1
Chemicals	33.6	33.6	34.1	0.0	-0.5
Petroleum, Coal, Plastics	3.8	3.8	4.0	0.0	-0.2
SERVICE PRODUCING	251.9	252.0	254.3	-0.1	-2.4
TRANSPORTATION & PUBLIC UTILITIES	15.5	15.3	15.3	0.2	0.2
Transportation	10.2	10.1	10.2	0.1	0.0
Railroad Transportation	1.4	1.4	1.4	0.0	0.0
Local & Interurban Passenger Trans.	1.7	1.7	1.7	0.0	0.0
Trucking & Warehousing	4.9	4.8	4.7	0.1	0.2
Other Transportation	2.2	2.2	2.4	0.0	-0.2
Communications & Utilities	5.3	5.2	5.1	0.1	0.2
Communications	2.2	2.2	2.2	0.0	0.0
Electrical, Gas & Sanitary Services	3.1	3.0	2.9	0.1	0.2
WHOLESALE & RETAIL TRADE	73.0	72.9	74.0	0.1	-1.0
Wholesale Trade	13.4	13.5	13.3	-0.1	0.1
Wholesale-Durable	7.7	7.8	7.7	-0.1	0.0
Wholesale-Nondurable	5.7	5.7	5.6	0.0	0.1
Retail Trade	59.6	59.4	60.7	0.2	-1.1
Building Material & Garden Supplies	2.7	2.7	2.9	0.0	-0.2
General Merchandise Stores	8.1	8.2	8.9	-0.1	-0.8
Food Stores	9.4	9.4	9.1	0.0	0.3
Auto Dealers & Service Stations	6.5	6.5	6.7	0.0	-0.2
Apparel & Accessory Stores	3.3	3.2	3.3	0.1	0.0
Furniture & Home Furnishings	2.5	2.5	2.6	0.0	-0.1
Eating & Drinking Places	18.7	18.4	18.8	0.3	-0.1
Miscellaneous Retail	8.4	8.5	8.4	-0.1	0.0

Cont'd

Delaware Nonagricultural Employment by Selected Industry

INDUSTRY GROUP	Apr 91	Mar 91	Apr 90	Net Change From Mar 91	Net Change From Apr 90
FINANCE, INSURANCE & REAL ESTATE	32.2	32.3	31.4	-0.1	0.8
Finance	23.2	23.4	22.4	-0.2	0.8
Depository Institutions	20.3	20.5	19.4	-0.2	0.9
Other Finance	2.9	2.9	3.0	0.0	-0.1
Insurance	5.7	5.7	5.6	0.0	0.1
Real Estate	3.3	3.2	3.4	0.1	-0.1
SERVICES	83.8	84.0	84.3	-0.2	-0.5
Hotels & Other Lodging Places	3.1	3.0	2.9	0.1	0.2
Personal Services	3.3	3.3	3.2	0.0	0.1
Business Services	20.1	20.5	20.9	-0.4	-0.8
Automobile & Miscellaneous Repair	3.6	3.6	3.8	0.0	-0.2
Amusement & Recreation Services	3.4	3.2	3.3	0.2	0.1
Health Services	22.5	22.5	22.2	0.0	0.3
Hospitals	11.3	11.3	11.1	0.0	0.2
Other Health Services	11.2	11.2	11.1	0.0	0.1
Legal Services	2.7	2.7	2.9	0.0	-0.2
Educational Services	4.1	4.1	3.9	0.0	0.2
Social Services	6.8	6.8	6.6	0.0	0.2
Engineering & Management Services	5.3	5.4	5.8	-0.1	-0.5
Membership Organizations	5.5	5.5	5.3	0.0	0.2
Other Services	3.4	3.4	3.5	0.0	-0.1
GOVERNMENT	47.4	47.5	49.3	-0.1	-1.9
Federal Government	5.9	5.9	6.3	0.0	-0.4
State & Local Government	41.5	41.6	43.0	-0.1	-1.5
State Government	23.7	23.9	24.6	-0.2	-0.9
State Education	9.2	9.5	10.4	-0.3	-1.2
State Non-Education	14.5	14.4	14.2	0.1	0.3
Local Government	17.8	17.7	18.4	0.1	-0.6
Local Education	13.5	13.4	13.4	0.1	0.1
Local Non-Education	4.3	4.3	5.0	0.0	-0.7
Persons Involved In Work Stoppages	0.0	0.0	0.0	0.0	0.0

Current Data Preliminary; Previous Month Revised

1990 Unemployment Rates

Lowest		Highest	
Nebraska	2.2	West Virginia	8.3
Hawaii	2.8	Michigan	7.5
South Dakota	3.7	Mississippi	7.5
North Dakota	3.9	Alaska	6.9
North Carolina	4.1	Arkansas	6.9
Delaware	**5.1**	**United States**	**5.5**

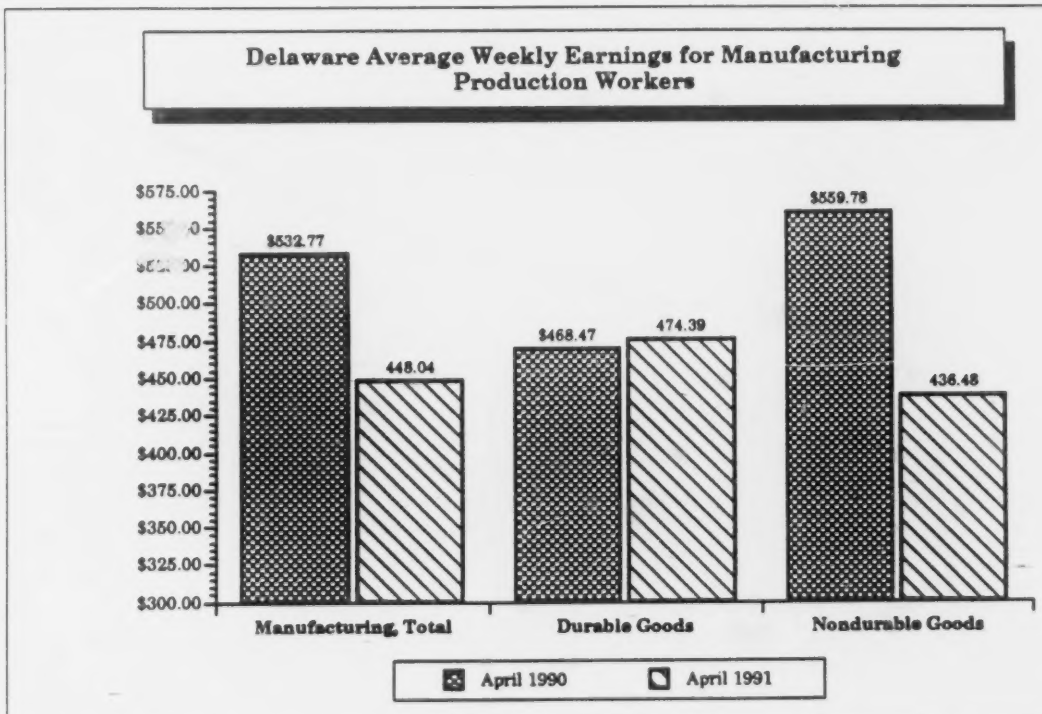
Hours and Earnings of Production Workers in Manufacturing Industries

Delaware *

	Weekly Earnings			Weekly Hours			Hourly Earnings		
	Apr 91	Mar 91	Apr 90	Apr 91	Mar 91	Apr 90	Apr 91	Mar 91	Apr 90
MANUFACTURING	$ 448.04	$ 474.28	$ 532.77	40.4	39.1	40.3	$11.09	$ 12.13	$ 13.22
DURABLE GOODS	474.39	546.05	468.47	38.6	38.4	36.4	12.29	14.22	12.87
Primary & Fabricated Metals	438.50	423.32	381.15	38.6	38.0	37.7	11.36	11.14	10.11
Machinery & Electrical Equipment	520.99	549.98	509.48	40.2	42.7	37.6	12.96	12.88	13.55
Transportation Equipment	724.68	666.62	547.74	39.6	38.6	34.0	18.30	17.27	16.11
Instruments & Related	373.46	366.91	374.26	38.7	38.3	40.2	9.65	9.58	9.31
Other Durable Goods	342.61	338.76	347.51	36.8	36.0	39.4	9.31	9.41	8.82
NONDURABLE GOODS	436.48	421.74	559.78	41.1	39.6	41.9	10.62	10.65	13.36
Food & Kindred Products	327.96	303.00	287.55	42.1	38.5	35.5	7.79	7.87	8.10
Textile, Apparel, Leather	336.04	329.75	351.25	37.8	37.6	39.6	8.89	8.77	8.87
Paper, Printing, and Publishing	398.94	429.24	410.55	36.4	39.2	39.4	10.96	10.95	10.42
Chemicals	638.91	624.14	702.24	42.2	42.2	44.7	15.14	14.79	15.71
Petroleum, Coal, Plastics	459.45	413.61	467.08	43.1	38.8	42.5	10.66	10.66	10.99

*Covers an Estimated 26,800 Production Workers

Current Data Preliminary; previous month revised



The Department of Labor Serving You Better. . .

Unemployment Insurance

In early May, Secretary of Labor Jan Ewing Robinson joined Governor Michael N. Castle to introduce the Division of Unemployment Insurance's "Voice Response Inquiry System," which provides clients with specific information about their unemployment insurance claims by telephone. The Voice Response Inquiry System allows a claimant to call the Department of Labor 24 hours a day, seven days a week, and receive claim information through the use of a touchtone phone. In New Castle County, the number is (302) 368-6903. In Kent and Sussex Counties, call 1-800-794-3032.

Another Unemployment Insurance Initiative involves the "No Report" policy. In the past, people receiving unemployment benefits were required to make bi-weekly visits to an unemployment office and verify their job search by bringing weekly claim forms and work search verification cards. These forms can now be mailed to the Division of Unemployment Insurance. Both of these initiatives allow staff more time to personally service clients entering Department of Labor offices.

Employment and Training

On April 17, Governor Castle unveiled touch-screen ALEX (Automated Labor EXchange), a computer-based system giving job seekers greater access to information on employment opportunities in Delaware, the region, and the nation. Touch-screen ALEX allows job seekers to access computerized job information by simply touching a computer screen to execute computer commands. This easy-to-use, self-service unit gives free information on opportunities from entry-level to highly technical and professional positions and can match military experience to related civilian jobs. Call the nearest Department of Labor Employment and Training Office for more information: New Castle County—(302) 577-2662; Dover—(302) 739-5473; and Georgetown—(302) 856-5230.

Vocational Rehabilitation

Also in April, the Governor's Committee on Employment of People with Disabilities selected six winners for the Journalism and Poster/Graphics components of the Ability Counts Scholarship Program. Open to high school juniors and seniors statewide, this contest is designed to promote awareness of disabled citizens.

Office of Occupational and Labor Market Information

The Office of Occupational and Labor Market Information (OOLMI) has developed a Labor Market Information (LMI) Team to focus exclusively on the many implications of the serious workforce issue faced by both the State and the Nation. The team will focus on areas such as occupational projections to the year 2005, women in the workforce, and career-related issues designed to prepare job seekers for an increasingly competitive job market.

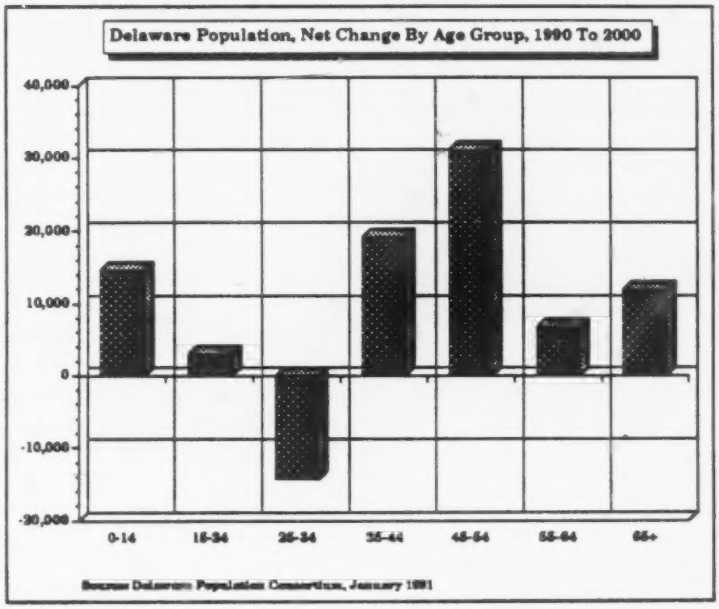
In Cooperation With. . .

. . . the State of Delaware, the Dover Air Force Base, the U.S. Department of Labor's Veterans Employment and Training Service, and the Department of Veterans Affairs, the Transition Assistance Program (TAP) arrived at the Dover Air Force Base in early April. TAP is a three-day job-training workshop designed to prepare retiring military personnel and their spouses to enter the civilian workforce. The workshop is held once a month and provides information on career decision-making, an evaluation of employability, substance abuse information, current occupational and labor market information, a review of the tools required to conduct a successful job search, and the availability of training programs.

The Changing Workplace

In the past few years, the employment picture in Delaware has done a complete about-face. From unprecedented job growth in the 1980's to relatively flat growth in the early 90's, Delaware employers remain united on one front: the State needs skilled, well-educated workers who can rise to the challenges of a changing workplace.

During the 1980's, Delaware experienced the seventh fastest rate of job growth in the nation, with the creation of over 87,000 new jobs. As growth accelerated and opportunities became available, Delaware rose out of the economic doldrums to a prosperity virtually unrivaled anywhere in the nation. As the decade came to a close, Delaware was faced with a dilemma: a tightening labor market with more jobs than qualified people to fill them. This, in turn, contributed to a job growth slowdown that carried over into the 1990's and remains with us today.

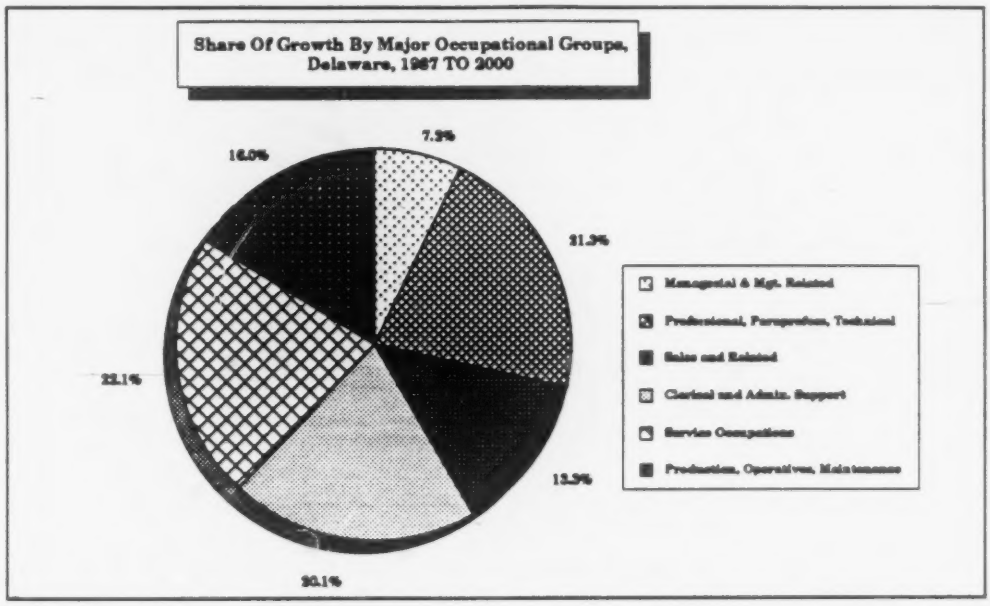


Today, Delaware's weak job growth is attributed to a recession that has plagued much of the Nation, especially the Northeastern and Mid-Atlantic states. A slowing economy has caused companies to layoff hundreds of workers, making competition for available openings quite intense. Unemployed job seekers with marginal skills and limited training face a very competitive market with a potentially long job search ahead. Even highly-skilled job-seeking executives will find it tough as companies streamline to cut costs and maximize profits. In the 1980's, it was a buyer's market, with employers searching high and low for qualified applicants. In the 1990's, the impetus lies with the job-seeker, who must compete with many other applicants for fewer job openings.

Whether the economy is up or down, the need to address difficult workplace issues always remains with us. In these recessionary times, companies must do everything they can to compete as well as survive in what has become a global marketplace. To do this, they must hire people who can adapt to the technological and economic changes occuring in the workplace.

Technology is changing the workplace to a point where a current occupation may not even exist or will have changed beyond recognition within 10 years. This is where the value of education becomes critical. To be successful, workers must be flexible enough to adapt, improve, and update their skills to meet the changing needs of their employers. The concept of life-long learning has become a mandatory element of workforce participation as employers develop on-the-job training and education programs for their workers. As global competition increases, education and training will play a key role in the next 10 years since nearly 25% of all new jobs will require a four-year college degree. Since employers are demanding higher skill levels of potential employees, it is imperative that we continue to improve our educational system.

When planning for the future, employers and employees must be aware of the demographic changes taking place around them. The workforce is aging. By the year 2000, the over-35 age category will see the largest growth. Of that, the 45-54 age group will see the biggest gain (31,000), reflecting an aging of the baby-boom generation. The number of 25-34 year olds will actually decrease and those 15-24 will see only a marginal increase. At the lower end of the spectrum, those under the age of 14 will increase, creating a need for more teachers and schools.



What does this mean for employers and job seekers? Our current economic situation has forced laid-off experienced workers to pursue lower paying, entry-level jobs, thus making the job search much more competitive for younger workers.

As the country eases out of the recession and more jobs become available, the situation will change quite drastically. In the long run, 25-34 year olds will find it difficult to advance into the upper ranks due to the large numbers of 45-54 year olds. However, there still won't be enough younger workers to fill entry-level positions.

Another problem facing employers as we head toward the year 2000 is an overall shrinking of the labor force. Fewer workers mean employers will have to find ways to retain older workers in the workforce.

Women will also play an increasing role. In 1989, Delaware women had a labor force participation rate of 64%, ranking them third highest in the nation. Our challenge to employers is to find ways to attract more women to enter the workforce. This can be done by meeting the need for child care and offering incentives such as flextime and job sharing.

Although job growth has slowed, the prospects for future growth are not diminished. Through the year 2000, the Delaware Department of Labor projects 6,400 newly created jobs per year in the First State. In addition, another 12,000 "replacement" openings will occur due to people leaving the labor force. To ensure continued job growth in Delaware, it is imperative that employers and employees continue to address workforce issues and strive to make all of our citizens job-ready.

Unemployment Insurance Statistics

	April 1991	March 1991	April 1990	% Change From Prior Month	% Change From Year Ago
Initial Claims-Total *	6,386	8,944	6,144	-28.6%	3.9%
Auto Makers	2,464	5,466	3,083	-54.9%	-20.1%
Non-Auto	3,922	3,478	3,061	12.8%	28.1%
Weeks Claimed **	50,828	42,756	20,509	18.9%	147.8%
Auto Makers	15,438	5,994	2,987	157.6%	416.8%
Non-Auto	35,390	36,762	17,522	-3.7%	102.0%
First Payments #	1,643	2,147	1,036	-23.5%	58.6%
Final Payments ##	469	411	190	14.1%	146.8%
Weeks Compensated @	47,360	44,016	19,948	7.6%	137.4%
Amount Compensated	$8,650,958	$7,616,681	$3,264,548	13.6%	165.0%
Average Weekly Check Amount	$182.66	$173.04	$163.65	5.6%	11.6%

* **Initial Claims** include New Initial Claims and Additional Initial Claims. A New Initial Claim is filed when a person becomes unemployed and files for unemployment insurance for the very first time in a benefit year. Additional Initial Claims are filed when someone has already filed a New Initial Claim due to unemployment, returned to work for at least a week, and then become unemployed again.

** **Weeks Claimed** account for the total number of weeks claimed for unemployment insurance within a given month.

\# **First Payments** are New Initial Claims that receive unemployment compensation checks.

Final Payments occur when a claimant receives the last check in his or her benefit cycle (not to exceed one year).

@ **Weeks Compensated** account for the number of Weeks Claimed that were paid during the month.

Total initial claims were higher in March than in April due to start of temporary layoffs in the auto industry during the latter part of the month. But the layoffs continued into April and increased the weeks claimed for that month.

Non-auto related initial claims for April 1991 were 3,922 or nearly 13% higher than in March 1991 and 28% higher than the same period last year. This measure, a more accurate gauge on economic activity than the volatile total intital claims measure, would indicate that the recession continues to take its toll on Delaware's economy.

Weeks claimed for April were 50,828, a rise of 19% over March and a jump of nearly 148% over April 1990. Non-auto weeks claimed were double that of a year ago.

The amount compensated by unemployment insurance was $8.7 million in April 1991 compared to $7.6 million in March, 1991 and $3.3 million in April 1990.

The average weekly check to claimants was $182.66 in April 1991 compared to $163.65 in April 1990.

Unemployment Insurance Benefits Quality Control Data

The Unemployment Insurance Benefits Quality Control review process continued to be used during calendar year 1990 as a diagnostic tool by Division of Unemployment Insurance staff to identify errors and their causes and in correcting and tracking solutions to problems. Weekly random samples of unemployment insurance benefits payments were selected and examined thoroughly to determine if claimants were paid the proper benefit amounts. On the basis of the errors identified, the Division develops and implements corrective action to insure the effective and efficient administration of this State's unemployment insurance program, laws, rules, and procedures.

The three primary causes of improper benefit payments and subsequent overpayments are:

(1) Failure of claimant to actively seek work.
(2) Untimely registration or non-registration of claimant for work with Division of Employment and Training.
(3) Failure of claimant to properly report wages.

During calendar year 1990, the Division of Unemployment Insurance continued to aggressively address the issues of active work search and registration for work through the following efforts:

(1) The "work search verification" program which was implemented in December 1989 remains in effect. As a condition of the weekly active work search eligibility requirement, an unemployed individual must submit at least one work search verification card, completed and signed by a representative of the employer contacted, for each week of benefits claimed.

(2) The use of a "work search verification" follow-up letter submitted, on a random basis, to employers to verify that job contacts have been made by unemployed individuals was increased.

(3) The cross-matching of claimant files and the exchange of information was continued between the Division of Unemployment Insurance and the Division of Employment and Training to verify claimant work registration status.

An initiative under consideration for implementation during calendar year 1991 is the inclusion of weeks of reduced benefit payments in the employer cross match process.

Overpayments identified by the Quality Control review process were reduced by 6.8% from the previous year. More importantly, during the first four months of calendar year 1991, overpayments identified by the Quality Control review process have been reduced an additional 10.0%. Clearly, the corrective action taken has proven to be an effective means to prevent and detect benefit overpayments.

During calendar year 1990, the State of Delaware continued its proactive approach to effect the recovery of benefit overpayments. Recovery methods used were benefit offset, cash collections, court prosecution, and state income tax refund intercept. As a result of these various recovery efforts, a total of $493,945 was recovered for the Delaware Unemployment Insurance Trust Fund, an increase of 16.2% over last year. In addition, a recovery rate of 66.0% was realized during the year which exceeds, by 11.0%, the desired level of achievement established by the U.S. Department of Labor, Employment and Training Administration.

Finally, a summary of the "Benefit Quality Control Data" for CY 1990 is provided in the table on the following page:

Unemployment Insurance Benefits Quality Control Data (CY 1990)

Total Dollars Paid in Population	$35,108,817
Total Dollars Paid in Sample	$85,284
Sample Size (# of claims reviewed)	494
Weeks of Benefits Claimed in Population	207,593
Weeks of Benefits Claimed in Sample	494

	Percentage of Dollars	Confidence Interval
Proper Payments within Sample	84.6%	+ or - 3.4%
Overpayments within Sample	15.4%	+ or - 3.4%
Total	100.0%	
Underpayments	0.5%	+ or - 0.4%

Note: The State completed 92.9% of the cases within 90 days. The QC program requirement is 95.0% completed within 90 days.

Although 1.2% of the nple cases were not completed when this report was epared, this did not exceed the QC program requirement that no more than 2% of the cases for the year remain incomplete.

S140-2

Delaware Digest

Labor Market Monthly

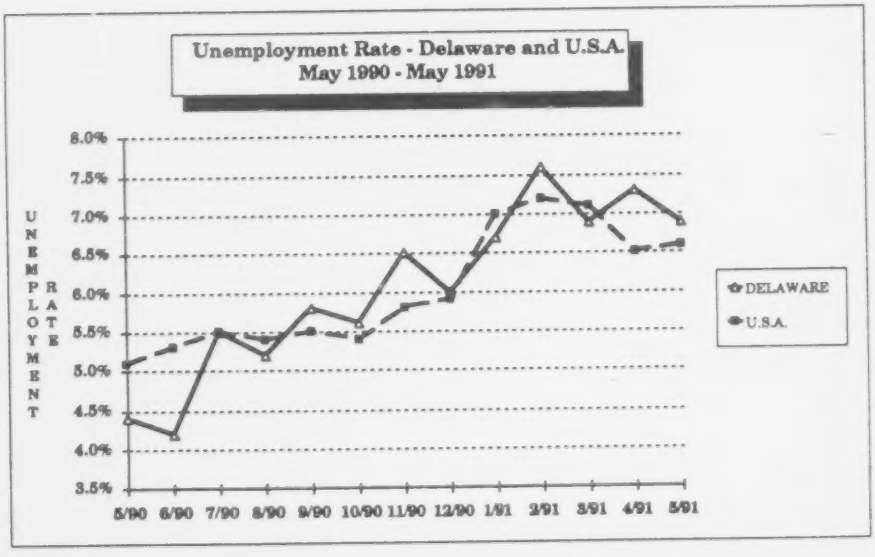
Volume 1, No.2 June, 1991

Delaware Department of Labor
Office of Occupational & Labor Market Information

Recall of Auto Workers and Seasonal Hiring Drive Jobless Rate Lower

Delaware's unemployment rate dropped to 6.9% in May, 1991 from a revised rate of 7.3% in April, 1991 due mostly to the recall of auto industry workers from temporary layoff as well as expected seasonal hiring. The rate in May, 1990 was lower at 4.4 percent. The number of jobless Delawareans in May, 1991 was 25,300 compared to 16,100 during the same month last year. From May, 1990 to May, 1991, Delaware's labor force grew from 363,100 to 366,700.

Total nonagricultural employment grew by 8,800 over the month to 346,600 jobs. Over-the-month job gains were in **manufacturing** (transportation equipment; and food products); **services** (seasonal gains in amusement and recreation; and business services); **wholesale and retail trade** (eating and drinking places); and **contract construction** (heavy construction). There were no significant over-the-month job losses.



For information about the unemployment rate, occupational projections, women in the workforce, the Delaware Occupational Information System (OIS), or any other Labor Market Information, contact the Office of Occupational and Labor Market Information at (302) 368-6960.

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Labor Force Trends

Delaware's unemployment rate dropped to 6.9% in May, 1991 from a revised rate of 7.3% in April due mostly to the recall of auto industry workers from temporary layoff. Expected seasonal hiring in such industries as amusement and recreational services and restaurants was also a factor in driving the rate lower. The rate in May, 1990 was at a pre-recessionary level of 4.4 percent. The number of jobless Delawareans was 25,300 compared to 16,100 in May, 1990. Nationally, the unemployment rate was 6.6% in May, 1991, the second consecutive month the national figure was lower than Delaware's jobless figure. For the remainder of 1991, we expect Delaware's jobless rate to track closely to the national rate.

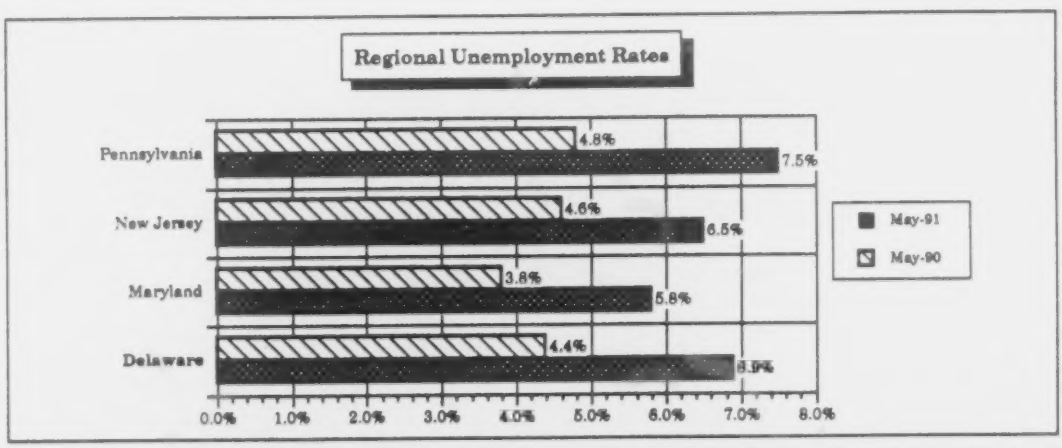
From May, 1990 to May 1991, the State's labor force rose slightly from 363,100 to 366,700. The estimate of employed residents is down over the year from 347,100 to 341,400.

According to estimates from the Current Population Survey, nearly one-third of Delaware's unemployed are new and re-entrants to the workforce. This is a higher proportion than in the past and indicates that recent graduates and other new job seekers continue having difficulty finding full-time, permanent positions. This trend will probably continue for the next several months as employers remain cautious despite a slight improvement in national economic trends.

Delaware's Civilian Labor Force

	May 1991	April 1991	May 1990
Civilian Labor Force	366,702	363,541	363,137
Employment	341,385	336,859	347,077
Unemployment	25,317	26,682	16,060
Unemployment Rate	6.9	7.3	4.4
National Unemployment Rate	6.6	6.5	5.1

Despite continued sluggishness in the local job market, some seasonal opportunities exist in resort-related jobs, food processing, restaurants, and outdoor activities. Generally, employment rises significantly during the summer months, but only modest increases are expected for the remainder of this summer. The auto industry is planning retooling activities in late summer and this will affect the unemployment rate. Considering the factors of rising seasonal employment, offset by a continued sluggish economy, the outlook for the remainder of the summer is for higher-than-normal unemployment rates above the 6% range.



Local Area Unemployment Statistics

May 1991 - Preliminary

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide	366,702	341,385	25,317	6.9
2. Wilmington, PMSA	317,571	296,036	21,535	6.8
3. New Castle County	249,184	232,714	16,470	6.6
4. Balance of NCC (1)	214,229	201,218	13,011	6.1
5. Wilmington City	34,955	31,496	3,459	9.9
6. Newark City	14,297	12,995	1,302	9.1
7. Kent County	52,938	48,217	4,721	8.9
8. Sussex County	64,580	60,454	4,126	6.4
9. United States (000's) (Non-Seasonal)	124,857	116,624	8,233	6.6
10. United States (000's) (Seasonal)	125,232	116,591	8,640	6.9

April 1991 - Final

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide	363,541	336,859	26,682	7.3
2. Wilmington, PMSA	316,499	291,298	25,201	8.0
3. New Castle County	248,439	229,008	19,431	7.8
4. Balance of NCC (1)	213,998	198,014	15,984	7.5
5. Wilmington City	34,441	30,994	3,447	10.0
6. Newark City	13,596	12,788	808	5.9
7. Kent County	52,379	48,439	3,940	7.5
8. Sussex County	62,724	59,413	3,311	5.3
9. United States (000's) (Non-Seasonal)	124,727	116,678	8,049	6.5
10. United States (000's) (Seasonal)	125,672	117,398	8,274	6.6

(1) Balance of NCC equals New Castle County minus Wilmington City

NOTE: Due to rounding, totals may not add and data may not match similar statistics published in various other state or National releases.

Industry Trends

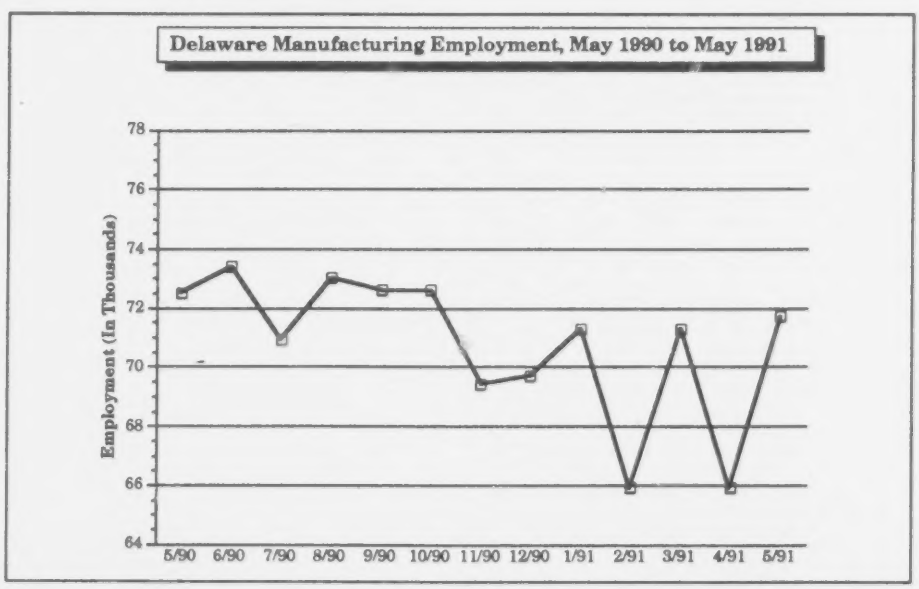
Between April and May of this year, Delaware's nonagricultural employment rose by 8,800 to 346,600 jobs. **Manufacturing** saw the biggest gain with the recall of 5,600 auto workers in the transportation equipment industry following a temporary layoff. Discounting the affect of the auto industry, there was a gain of about 3,200 jobs. **Services** had increases throughout with the largest gains in amusement and recreational services. **Wholesale and retail trade** saw gains due to increased employment in eating and drinking places. **Contract construction** showed an increase in heavy construction (highway and road contractors) with no losses in general building and special trade contractors.

Typically, there is a large increase in jobs between April and May due to seasonal hiring. Over the past eight years, the April-to-May gain has averaged 3,600 jobs. The increase this year in the non-auto sector employment compares favorably with past trends. This may indicate that the job market is beginning to stabilize. However, a one-month trend is not indicative of future activity.

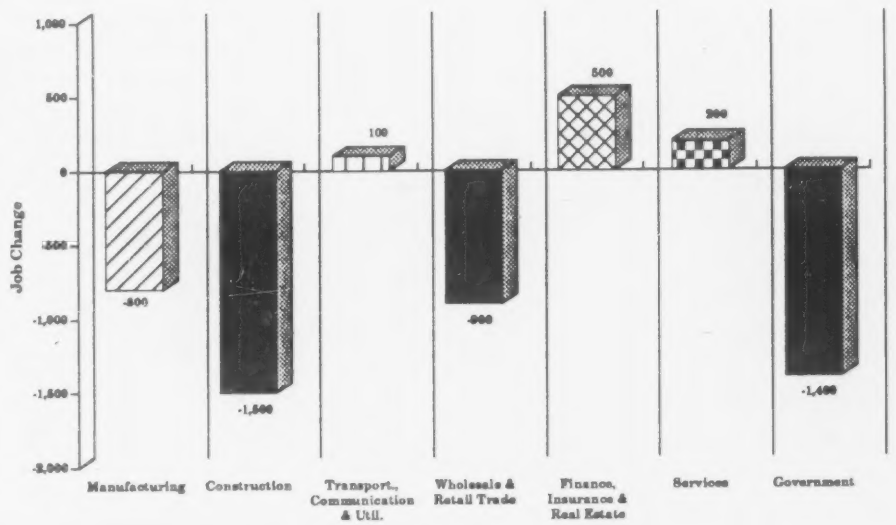
Total nonagricultural employment has declined by 3,800 since May 1990. Job losses since May of last year have been in **contract construction** (general building; and special trades); **government** (federal; state education; and local non-education); **wholesale and retail trade** (general merchandise stores; and eating and drinking places); **manufacturing** (chemicals; and in various durable goods industries). Over the year, employment gains have been in **finance, insurance and real estate** (banking).

Although Delaware shows a loss of 3,800 jobs (first five months of the year) compared to the same period a year ago, there is room for optimism in that there were no significant over-the-month job losses in May. However, there is no indication of permanent job growth in the near future as the effects of the recession linger. Key industries to monitor as indicators of economic change are contract construction, finance, and business services. An economic recovery will add jobs to these sectors.

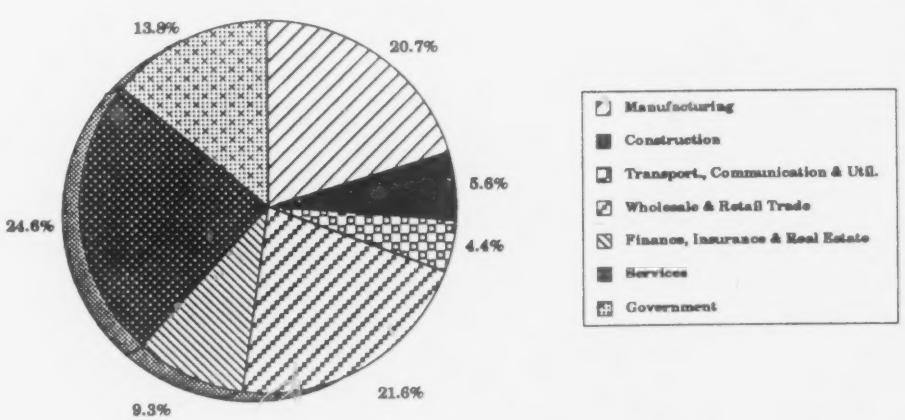
Over the next several months, the Delaware Department of Labor anticipates minimal job growth. The gains will most likely be in industries that usually show summer gains such as restaurants, amusement services, and food processing. Expectations for long-term expansion in the job market do not appear favorable at this time.



Net Job Change By Sector, Delaware May 1990 To May 1991



Percent Of Total Employment By Sector, Delaware, May 1991



Delaware Nonagricultural Employment by Selected Industry

INDUSTRY GROUP	May 91	Apr 91	May 90	Net Change to May 1991 from: Apr 91	May 90
TOTAL NONAG. EMPLOYMENT	346.6	337.8	350.4	8.8	-3.8
GOODS PRODUCING	91.1	85.0	93.4	6.1	-2.3
MINING	0.1	0.1	0.1	0.0	0.0
CONTRACT CONSTRUCTION	19.3	19.0	20.8	0.3	-1.5
General Building Contractors	4.7	4.7	5.2	0.0	-0.5
Heavy Construction Contractors	4.0	3.7	3.6	0.3	0.4
Special Trade Contractors	10.6	10.6	12.0	0.0	-1.4
MANUFACTURING	71.7	65.9	72.5	5.8	-0.8
Durable Goods	18.5	12.9	18.8	5.6	-0.3
Primary & Fabricated Metals	3.1	3.2	3.3	-0.1	-0.2
Machinery & Electrical Equipment	1.7	1.8	1.9	-0.1	-0.2
Transportation Equipment	8.1	2.5	7.7	5.6	0.4
Instruments & Related Products	3.0	3.0	3.1	0.0	-0.1
Other Durable Goods	2.6	2.4	2.8	0.2	-0.2
Nondurable Goods	53.2	53.0	53.7	0.2	-0.5
Food & Kindred Products	9.1	8.8	8.7	0.3	0.4
Textile, Apparel, Leather	1.6	1.6	1.6	0.0	0.0
Paper, Printing, Publishing	5.2	5.1	5.2	0.1	0.0
Chemicals	33.5	33.6	34.2	-0.1	-0.7
Petroleum, Coal, Plastics	3.8	3.9	4.0	-0.1	-0.2
SERVICE PRODUCING	255.5	252.8	257.0	2.7	-1.5
TRANSPORTATION & PUBLIC UTILITIES	15.4	15.4	15.3	0.0	0.1
Transportation	10.1	10.1	10.1	0.0	0.0
Railroad Transportation	1.4	1.4	1.4	0.0	0.0
Local & Interurban Passenger Trans.	1.7	1.7	1.8	0.0	-0.1
Trucking & Warehousing	4.8	4.8	4.8	0.0	0.0
Other Transportation	2.2	2.2	2.1	0.0	0.1
Communications & Utilities	5.3	5.3	5.2	0.0	0.1
Communications	2.2	2.2	2.2	0.0	0.0
Electrical, Gas & Sanitary Services	3.1	3.1	3.0	0.0	0.1
WHOLESALE & RETAIL TRADE	74.7	73.7	75.6	1.0	-0.9
Wholesale Trade	13.5	13.4	13.3	0.1	0.2
Wholesale-Durable	7.7	7.7	7.7	0.0	0.0
Wholesale-Nondurable	5.8	5.7	5.6	0.1	0.2
Retail Trade	61.2	60.3	62.3	0.9	-1.1
Building Material & Garden Supplies	2.7	2.7	2.9	0.0	-0.2
General Merchandise Stores	8.3	8.3	8.7	0.0	-0.4
Food Stores	9.4	9.4	9.3	0.0	0.1
Auto Dealers & Service Stations	6.7	6.6	6.7	0.1	0.0
Apparel & Accessory Stores	3.5	3.4	3.4	0.1	0.1
Furniture & Home Furnishings	2.5	2.5	2.6	0.0	-0.1
Eating & Drinking Places	19.6	18.9	20.2	0.7	-0.6
Miscellaneous Retail	8.5	8.5	8.5	0.0	0.0

Cont'd

Delaware Nonagricultural Employment by Selected Industry

INDUSTRY GROUP	May 91	Apr 91	May 90	Net Change to May 1991 from: Apr 91	May 90
FINANCE, INSURANCE & REAL ESTATE	32.2	32.2	31.7	0.0	0.5
Finance	23.2	23.2	22.6	0.0	0.6
Depository Institutions	20.3	20.3	19.6	0.0	0.7
Other Finance	2.9	2.9	3.0	0.0	-0.1
Insurance	5.7	5.7	5.6	0.0	0.1
Real Estate	3.3	3.3	3.5	0.0	-0.2
SERVICES	85.3	84.1	85.1	1.2	0.2
Hotels & Other Lodging Places	3.2	3.1	3.1	0.1	0.1
Personal Services	3.3	3.3	3.0	0.0	0.3
Business Services	20.5	20.3	21.1	0.2	-0.6
Automobile & Miscellaneous Repair	3.7	3.6	3.8	0.1	-0.1
Amusement & Recreation Services	3.8	3.4	3.5	0.4	0.3
Health Services	22.6	22.6	22.4	0.0	0.2
Hospitals	11.4	11.4	11.2	0.0	0.2
Other Health Services	11.2	11.2	11.2	0.0	0.0
Legal Services	2.8	2.7	2.9	0.1	-0.1
Educational Services	4.1	4.1	3.9	0.0	0.2
Social Services	6.9	6.8	6.6	0.1	0.3
Engineering & Management Services	5.4	5.3	5.8	0.1	-0.4
Membership Organizations	5.5	5.5	5.4	0.0	0.1
Other Services	3.5	3.4	3.6	0.1	-0.1
GOVERNMENT	47.9	47.4	49.3	0.5	-1.4
Federal Government	5.9	5.9	6.5	0.0	-0.6
State & Local Government	42.0	41.5	42.8	0.5	-0.8
State Government	24.2	23.7	24.6	0.5	-0.4
State Education	9.7	9.2	10.3	0.5	-0.6
State Non-Education	14.5	14.5	14.3	0.0	0.2
Local Government	17.8	17.8	18.2	0.0	-0.4
Local Education	13.4	13.5	13.1	-0.1	0.3
Local Non-Education	4.4	4.3	5.1	0.1	-0.7
Persons Involved In Work Stoppages	0.0	0.0	0.0	0.0	0.0

Current Data Preliminary; Previous Month Revised

What is Education Worth?

Average Monthly Income by Degree Level

	1984	1987		1984	1987
Dropout	$500	$500	Bachelor	$1,725	$1,850
High School	$998	$998	Master	$2,125	$2,400
Vocational/College	$1,075	$1,100	Doctoral	$3,000	$3,675
Associate	$1,300	$1,525	Other Professional	$3,800	$4,000

Source: U.S. Department of Commerce, Bureau of Census, 1987, 1990

Hours and Earnings of Production Workers in Manufacturing Industries

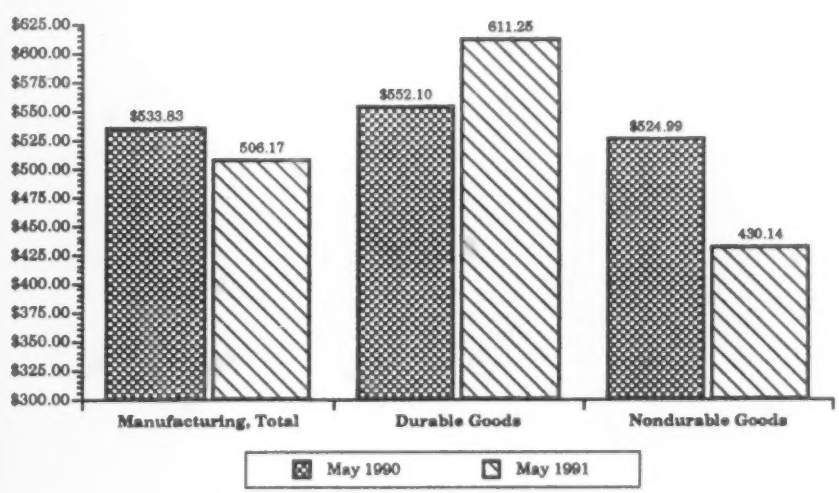
Delaware *

	Weekly Earnings			Weekly Hours			Hourly Earnings		
	May-91	Apr-91	May-90	May-91	Apr-91	May-90	May-91	Apr-91	May-90
MANUFACTURING	$ 506.17	$ 447.23	$ 533.83	40.3	40.4	42.3	$12.56	$ 11.07	$ 12.62
DURABLE GOODS	611.25	475.69	552.10	40.4	38.8	42.6	15.13	12.26	12.96
Primary & Fabricated Metals	436.21	447.27	413.12	37.8	39.2	39.8	11.54	11.41	10.38
Machinery & Electrical Equipment	511.15	512.41	514.76	40.6	40.7	40.5	12.59	12.59	12.71
Transportation Equipment	784.83	724.68	701.24	42.7	39.6	45.3	18.38	18.30	15.48
Instruments & Related	369.40	372.49	366.17	38.6	38.6	39.5	9.57	9.65	9.27
Other Durable Goods	349.67	346.45	350.06	35.9	36.7	39.6	9.74	9.44	8.84
NONDURABLE GOODS	430.14	435.66	524.99	40.2	41.1	42.1	10.70	10.60	12.47
Food & Kindred Products	330.08	327.96	313.82	40.6	42.1	38.6	8.13	7.79	8.13
Textile, Apparel, Leather	335.78	332.50	369.67	38.2	38.0	42.2	8.79	8.75	8.76
Paper, Printing, and Publishing	398.21	398.58	406.45	36.3	36.4	38.2	10.97	10.95	10.64
Chemicals	633.18	638.91	645.92	42.1	42.2	44.0	15.04	15.14	14.68
Petroleum, Coal, Plastics	423.69	458.81	481.58	40.7	43.0	43.9	10.41	10.67	10.97

*Covers an estimated 33,200 Production Workers

Current Data Preliminary; previous month revised

Delaware Average Weekly Earnings for Manufacturing Production Workers



The Department of Labor Serving You Better. . .

Office of Occupational and Labor Market Information

In early July, the Office of Occupational and Labor Market Information announced the average weekly wage in Delaware for calendar year 1990 was $468.58. This represents a 5.1% increase over the 1989 figure of $445.81. Delaware's average yearly wage for 1990 was $24,366, compared to $23,182 in 1989.

In early June the Office of Occupational and Labor Market Information began the State's most extensive occupational employment wage survey, encompassing over 2,100 Delaware employers. In conjunction with the U.S. Department of Labor, the Delaware Department of Labor is one of 13 states plus the District of Columbia, Guam, and Puerto Rico to conduct the survey, which covers employers in the following industries: Transportation, Communication, and Public Utilities; Wholesale and Retail Trade; Educational Services; and State and Local Government.

The current survey is part of a three-year study in which approximately one-third of all industries is sampled each year. The survey asks employers to provide occupational titles and corresponding wage ranges for all of their employees. All information provided will be summarized, and will not identify specific employers.

The second phase of the survey will take place in 1992, covering the Manufacturing and Hospitals industries. The final segment, including Nonmanufacturing industries such as Finance, Insurance, and Real Estate, will be conducted in June of 1993.

Division of Unemployment Insurance

In June, Governor Michael N. Castle signed into law a bill raising the maximum weekly benefit amount (MWBA) for Unemployment Insurance claimants by $20. Designed by the Unemployment Compensation Advisory Council, HB 273 raises the MWBA from $225.00 to $245.00 a week, effective July 1. The Unemployment Compensation Advisory Council includes representatives of business, organized labor, the Legislature, and the Castle administration.

Despite higher benefit payments, Delaware employers will not see higher tax bills to compensate for larger payouts. Instead, the Unemployment Insurance Trust Fund has been safeguarded with an enhanced "trigger" mechanism. If the Trust Fund falls below $150 million, the MWBA will be reduced to $225.00 a week. If the fund drops below $90 million, the MWBA will be further reduced to $205.00 a week. The Fund currently contains approximately $220 million. Higher benefit payments are expected to cost the Fund an additional $4 million a year.

Division of Industrial Affairs

A bill overhauling Delaware's child labor statutes was signed into law by Governor Castle on July 16. SB 107, sponsored by Senator Herman M. Holloway, Sr. and Representative Steven C. Taylor, restricts teenagers under the age of 18 in the number of hours they can work, the types of occupations they can hold and the types of equipment they can use. The bill brings Delaware's child labor law closer to the Federal statutes, thereby reducing confusion on the part of employers who are required to comply with both.

Highlights of the bill:

- While school is in session, 14- and 15-year-olds cannot work before 7 a.m. or after 7 p.m.; more than four hours a day on a school day; more than 18 hours a week; or more than six days in a given week.
- While school is in session, 16- and 17-year-old employees may not spend more than 12 hours combined in work and school in a given day; and must have at least eight consecutive hours of non-work, non-school time in each 24-hour day.
- It is unlawful for an employer to retaliate against an employee who files a complaint or testifies against an employer.

Changes in the Workplace: Impact on Delaware Women

Demographic, technological, and economic changes in the workforce will have considerable impact on Delaware women over the next decade.

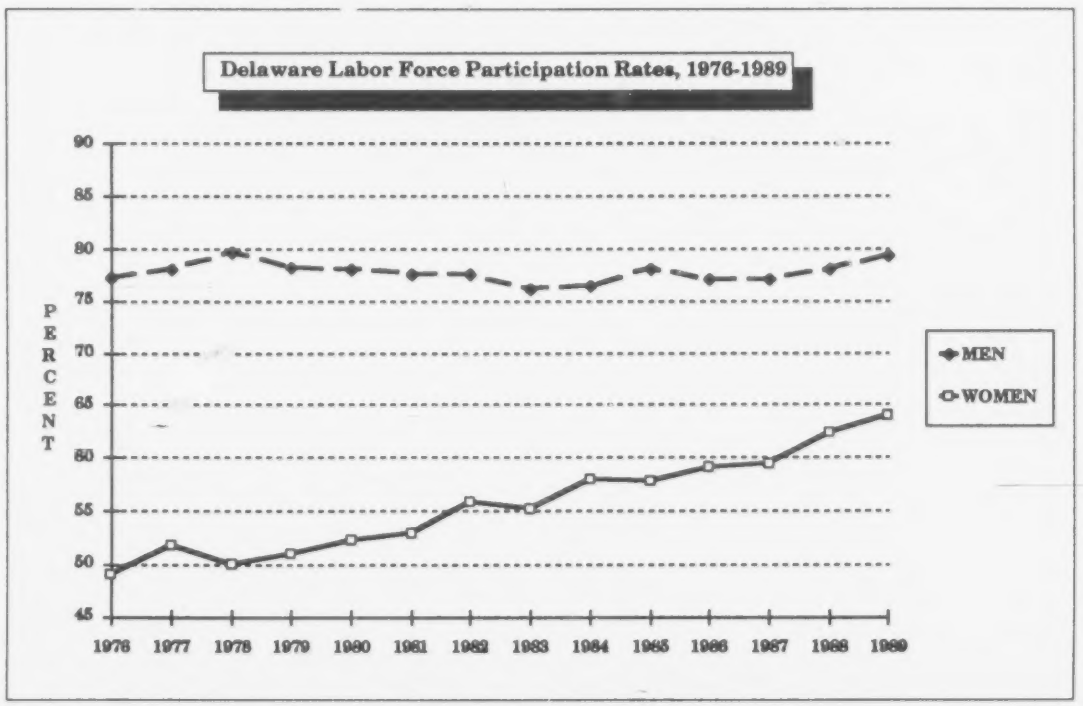
Workforce 2000, a national study by the Hudson Institute, indicates that 80% of new entrants into the national workforce during the next 10 years will be women, minorities, and immigrants. Nationally, 3/4th of all women over age 26 will be working in the year 2000. Key policy issues will include day care, elder care, transportation, flex-time, health care (including maternity leave), and stay-at-home jobs.

Delaware's population is aging. Between 1990 and 2000, the number of Delaware women aged 25-34 will decline about 11%, while the number of women aged 45-64 is expected to significantly increase by over 35 percent. As this happens, and the labor market tightens, more reliance will have to be placed on the retention and retraining of older female workers.

Sixty percent of all entrants into the workforce during the next 20 years are projected to be women, which will have a major impact on child care and elder care issues. Currently, three-fourths of those caring for the elderly are women, and more than half of these women also work outside the home. Nearly 40% are still raising children of their own. The average American woman will spend 17 years raising children and 18 years helping aged parents--creating a new "sandwich" generation.

The strains of caregiving are showing up in the workplace: Fourteen percent of female caregivers to the elderly have switched from full-time employment to part-time. Twelve percent have left the workforce entirely.

The labor force participation rate for Delaware women rose from 52.2% in 1980 (ranking 29th nationally) to 63.9% in 1989 (3rd nationally). (Labor force participation rate is the percent of women in Delaware over age 16 in the labor force.)



Office of Occupational and Labor Market Information

Since 1980, participation by selected age groups has increased substantially:

	1980	1989
35-44	66.1%	80.6%
45-54	59.6%	73.8%
55-64	41.1%	47.4%

Delaware faces a major challenge of increasing its already high female participation rate by enticing female workers back into the workforce through re-entry training programs, more attractive benefit packages (including child care and elder care), and flexible working hours.

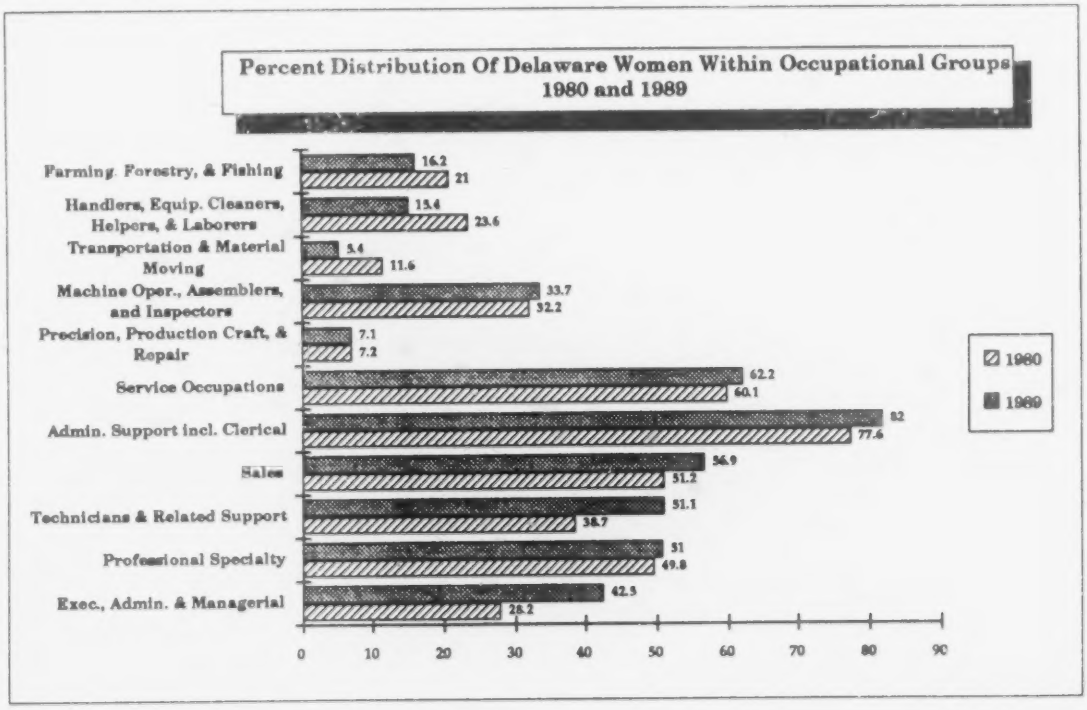
Women hold 69.4% of all part-time positions. However, the number of Delaware women working full time has increased by 81% since 1980.

The Delaware unemployment rates for men and women have moved together fairly consistently over the past few years:

Delaware Annual Average Unemployment Rates, Men vs. Women

Year	Total	Men	Women
1984	6.2	5.8	6.6
1985	5.3	5.0	5.6
1986	4.3	4.4	4.3
1987	3.2	3.0	3.4
1988	3.2	3.4	2.9
1989	3.5	3.8	3.2
1990	5.1	5.6	4.6

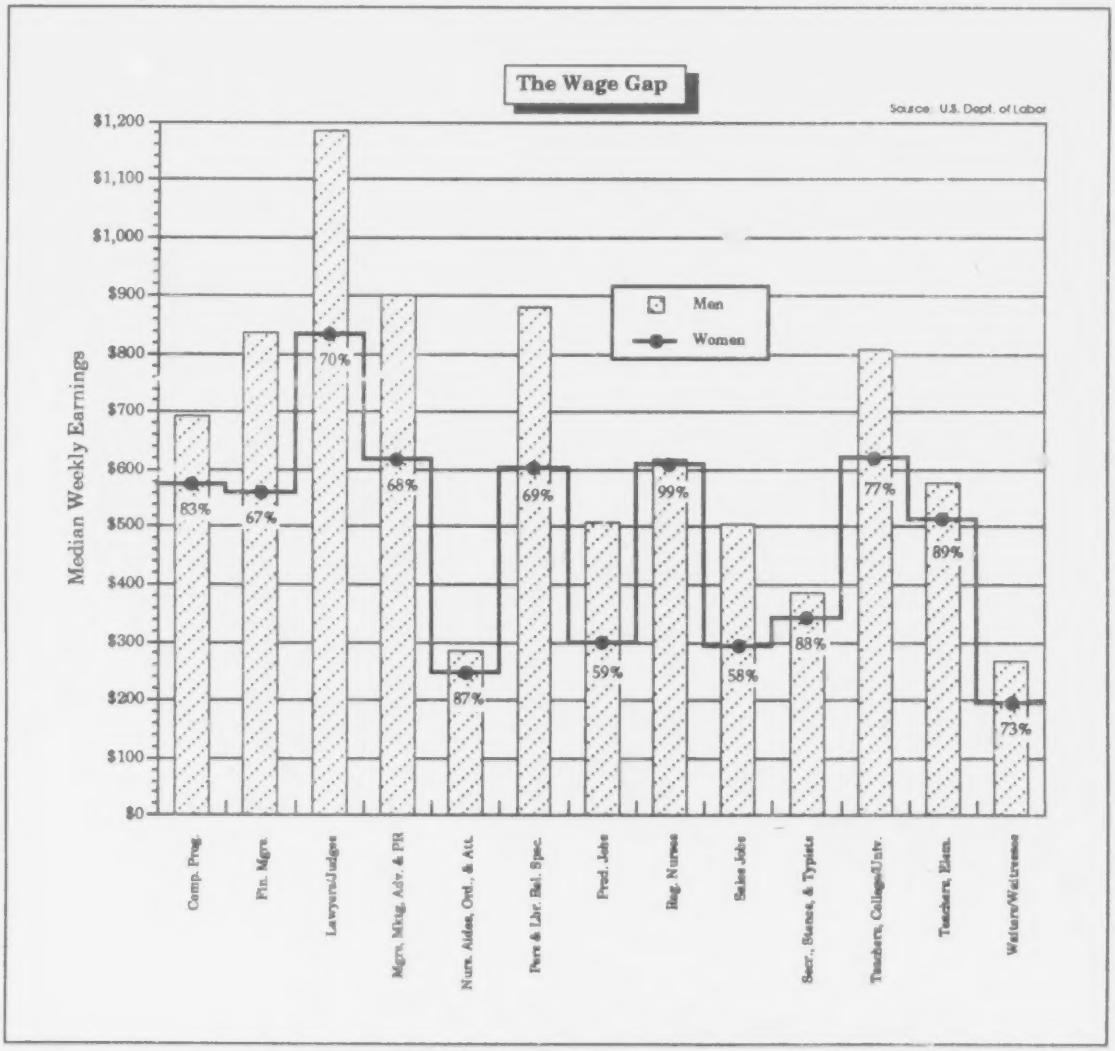
The percentage of total Delaware jobs held by women rose from 43.4% in 1980 to nearly 48% in 1989. The percentage of women in executive, administrative, and managerial occupations rose from 28.2% in 1980 to 42.5% in 1989. Over one-half of Delaware's professional jobs (i.e., doctors, lawyers, economists, teachers, registered nurses, engineers, and social workers) are now held by women. However, four of every five clerical jobs are still held by women. Very few Delaware women work in blue-collar jobs.



Today, three of every 100 top executive jobs, on average, at the largest U.S. companies, are held by women.

Women still earn less than men in almost every field, even those dominated by females, despite more than two decades of battles for equal opportunity. Nationally, women's earnings averaged $17,065 in 1989, about 70.1% of men's, up from 63.4% in 1980. Median weekly earnings of women by occupation ranged from lows of 58% and 59% of men's earnings in sales and production jobs to highs of 89% and 99% of men's earnings for teachers and registered nurses (traditionally female jobs).

Some contributing factors to the wage gap might be that more women are working part-time than men; fewer women than men are holding higher-paying blue-collar jobs; women still dominate the lower-paying clerical and service jobs; women lack seniority due to their recent rapid re-entry into the workplace, and rising educational costs prohibit lower-income women from gaining necessary skills for job placement and advancement.



Office of Occupational and Labor Market Information

Unemployment Insurance Statistics

	May 1991	April 1991	May 1990	% Change From Prior Month	% Change From Year Ago
Initial Claims-Total *	6,557	6,386	2,510	2.7%	161.2%
Auto Makers	3,181	2,464	0	29.1%	\\\\\\\
Non-Auto	3,376	3,922	2,510	-13.9%	34.5%
Weeks Claimed **	32,091	50,828	16,342	-36.9%	96.4%
Auto Makers	3,415	15,438	0	-77.9%	\\\\\\\
Non-Auto	28,676	35,390	16,342	-19.0%	75.5%
First Payments #	1,409	1,643	827	-14.2%	70.4%
Final Payments ##	486	469	203	3.6%	139.4%
Weeks Compensated @	31,514	47,360	15,094	-33.5%	108.8%
Amount Compensated	$5,404,275	$8,650,958	$2,449,210	-37.5%	120.7%
Average Weekly Check Amount	$171.49	$182.66	$162.26	-6.1%	5.7%

* **Initial Claims** include New Initial Claims and Additional Initial Claims. A New Initial Claim is filed when a person becomes unemployed and files for unemployment insurance for the very first time in a benefit year. Additional Initial Claims are filed when someone has already filed a New Initial Claim due to unemployment, returned to work for at least a week, and then become unemployed again.

** **Weeks Claimed** account for the total number of weeks claimed for unemployment insurance within a given month.

\# **First Payments** are New Initial Claims that receive unemployment compensation checks.

\#\# **Final Payments** occur when a claimant receives the last check in his or her benefit cycle (not to exceed one year).

@ **Weeks Compensated** account for the number of Weeks Claimed that were paid during the month.

Total Initial Claims remained fairly stable from April to May, although non-auto related claims fell nearly 14 percent. Historically, Delaware's initial claims count has tended to fall from April to May due to seasonal hiring, so by this measure, there is no clear indication that the recession is ending.

Weeks Claimed declined significantly, which would appear to indicate that some of the unemployed are returning to work more rapidly. Auto workers accounted for a large portion of this return to work as the auto plants were not idled as long in May as they had been in April.

The average weekly check amount of those receiving payments declined by over $11 in May due to a lower percentage of claims from auto workers. Virtually all auto workers receive the maximum $225 weekly benefit payment; therefore, the average check amount rises when workers are laid off. Auto workers accounted for 10.6% of all weeks claimed in May, down from 30.4% in April.

DELAWARE DEPARTMENT OF LABOR
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Delaware Digest

Labor Market Monthly

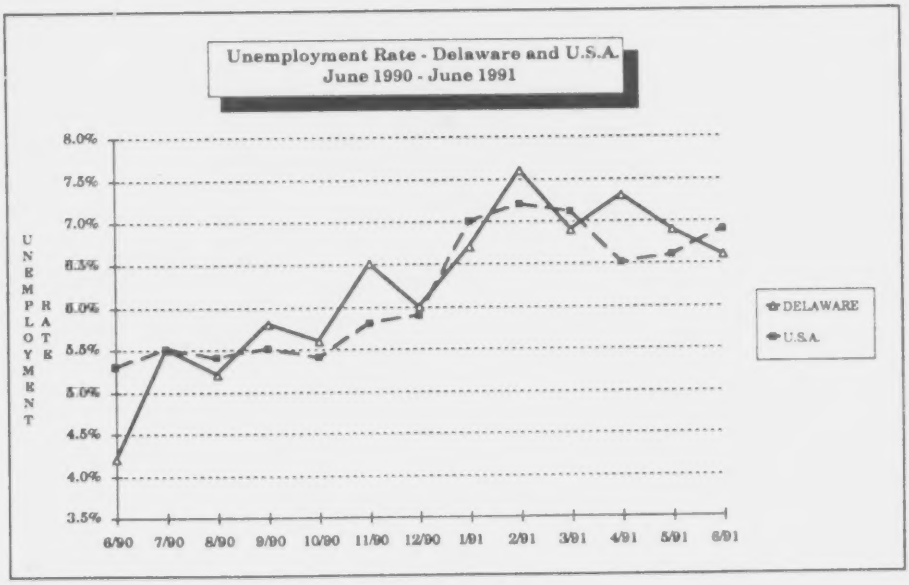
Volume 1, No.3 July, 1991

Delaware Department of Labor
Office of Occupational & Labor Market Information

Seasonal Hiring Lowers Delaware's Unemployment Rate

Delaware's unemployment rate dropped to 6.5% in June, 1991 from 6.9% in May, 1991 due mostly to seasonal hiring. The rate in June, 1990 was lower at 4.2%. Last month, 24,100 Delawareans were unemployed compared to 15,500 during June of 1990. Between June, 1990 and June, 1991, Delaware's labor force rose from 367,700 to 368,400.

Total nonagricultural employment rose by 3,300 over the month to 349,600 jobs. Over-the-month job gains were in Wholesale and Retail Trade, Services, Construction, and Transportation and Public Utilities. The only significant over-the-month job losses were in Government. Additional information on job gains can be found on page 4.



For information about the unemployment rate, occupational projections, women in the workforce, the Delaware Occupational Information System (OIS), or any other Labor Market Information, contact the Office of Occupational and Labor Market Information at (302) 368-6960.

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Labor Force Trends

Delaware's unemployment rate dropped from 6.9% in May 1991 to 6.5% in June 1991 due mostly to expected seasonal hiring in such industries as amusement and recreational services, and restaurants. The rate in June, 1990 was at a pre-recessionary level of 4.2%. The number of jobless Delawareans last month was 24,100 compared to 15,500 in June, 1990.

Nationally, the unemployment rate was 6.9% in June, 1991, the first time in three months that Delaware's rate was lower than the U.S. figure. For the remainder of 1991, Delaware's jobless rate should track closely to the national rate.

Delaware's Civilian Labor Force

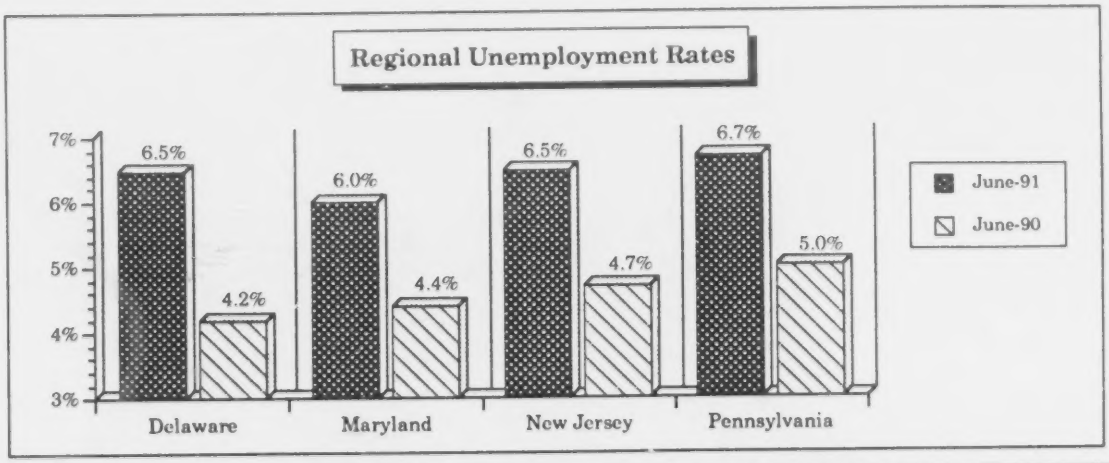
	June 1991	May 1991	June 1990
Civilian Labor Force	368,358	366,696	367,720
Employment	344,284	341,380	352,182
Unemployment	24,074	25,316	15,538
Unemployment Rate	6.5	6.9	4.2
National Unemployment Rate	6.9	6.6	5.3

From June, 1990 to June, 1991, the State's labor force rose slightly from 367,700 to 368,400. The labor force includes people, over the age of 16, who are working or actively seeking work. The estimate of employed Delaware residents is down over the year from 352,200 to 344,300.

The increase in the number of jobless Delawareans since last year is about 55%. The numbers of unemployed persons who are new and re-entrants to the workforce has remained at relatively high levels. Job seekers, especially those in the managerial and professional fields, face an exceedingly difficult job market.

The labor market is showing no signs of turning around. Despite the continued debate over the anticipated end to the recession, Delaware's job market continues to streamline. Employers are always looking for ways to cut costs, the easiest being labor costs. Recent announced changes at area banks as well as efforts at Dupont to cut $1 billion in fixed costs over the next two years will impact an already weak Delaware job market.

During the next couple of months expect a modest increase in seasonal employment. These new jobs, however, will be temporary and provide limited help for the economy. The overall outlook for the remainder of the summer is that of little or no improvement in unemployment conditions.



Local Area Unemployment Statistics

June, 1991 - Preliminary

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide	368,358	344,284	24,074	6.5
2. Wilmington, PMSA	316,455	295,103	21,352	6.7
3. New Castle County	247,224	231,295	15,929	6.4
4. Balance of NCC (1)	212,744	199,992	12,752	6.0
5. Wilmington City	34,480	31,303	3,177	9.2
6. Newark City	14,188	12,916	1,272	9.0
7. Kent County	52,808	48,218	4,590	8.7
8. Sussex County	68,326	64,771	3,555	5.2
9. United States (Non-Seasonal)	127,054	118,280	8,774	6.9
10. United States (000's) (Seasonal)	125,629	116,884	8,745	7.0

May, 1991 - Final

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide	366,696	341,380	25,316	6.9
2. Wilmington, PMSA	316,652	295,197	21,455	6.8
3. New Castle County	248,342	231,876	16,466	6.6
4. Balance of NCC (1)	213,504	200,494	13,010	6.1
5. Wilmington City	34,838	31,382	3,456	9.9
6. Newark City	14,274	12,948	1,326	9.3
7. Kent County	52,645	47,935	4,710	8.9
8. Sussex County	65,710	61,570	4,140	6.3
9. United States (Non-Seasonal)	124,857	116,624	8,233	6.6
10. United States (000's) (Seasonal)	125,232	116,591	8,640	6.9

(1) Balance of NCC equals New Castle County minus Wilmington City

NOTE: Due to rounding, totals may not add and data may not match similar statistics published in various other state or National releases.

Industry Trends

Between May and June of this year, Delaware's nonagricultural employment rose by 3,300 to 349,600 jobs. The gain was due mostly to seasonal hiring.

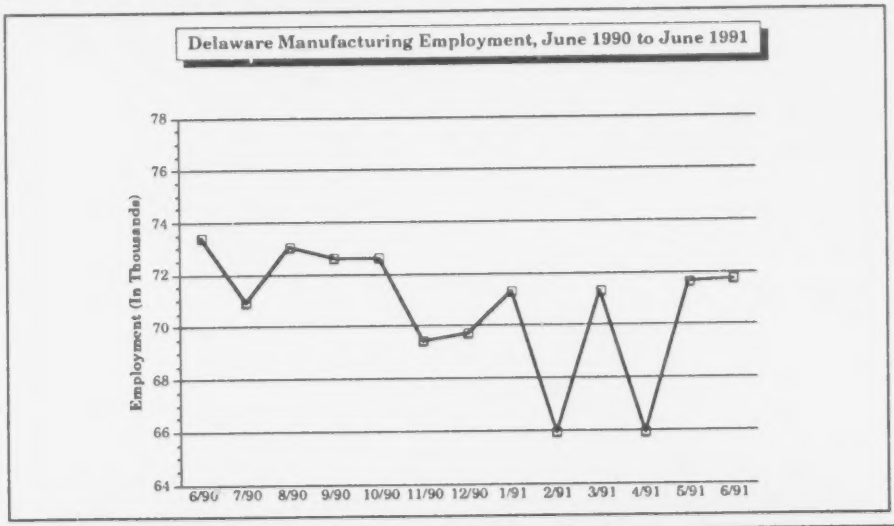
Job gains were in **wholesale trade** (seasonal increases in eating and drinking places; general merchandise stores; and food stores); **services** (seasonal increases in amusement and recreational services; small gains in health services); **construction** (seasonal job growth in special trades); and **transportation and public utilities** (trucking and warehousing). The only significant over-the-month job losses were in **government**, due to the early retirement option for State employees and seasonal declines in higher education.

Historically, there have always been significant seasonal job gains from May to June. Over the prior eight years, the May-to-June gain has averaged 5,600 jobs. The increase this year, therefore, is much below the average increase. Employers are still extremely cautious in Delaware--even in industries which had rapid spring/summer expansion.

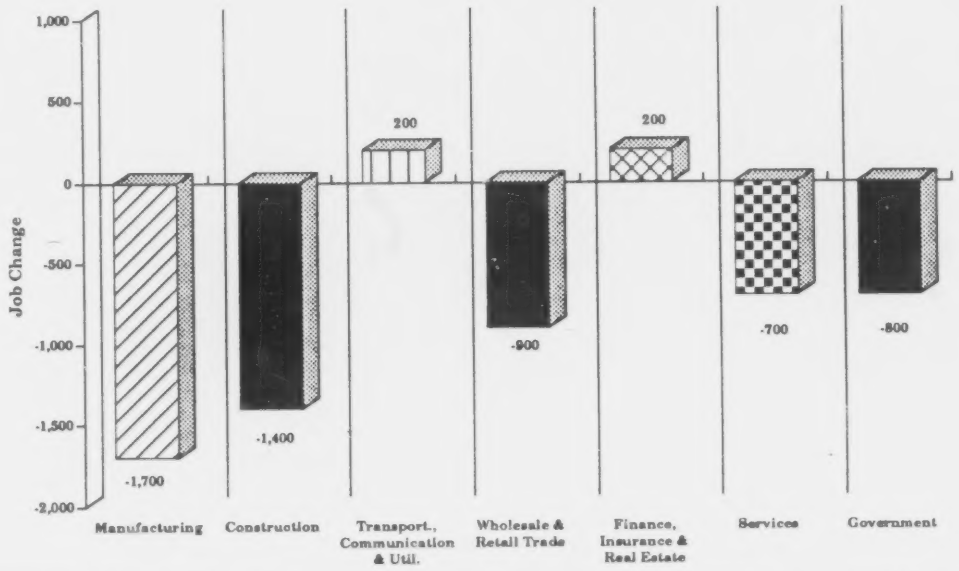
Since June, 1990, total nonagricultural employment has declined by 1.4% or 5,100 jobs. Job losses since June of last year have been in **contract construction** (general building; and special trades); **government** (federal; state non-education; and local non-education); **wholesale and retail trade** (building materials general merchandise stores; auto dealers; and eating and drinking places); **manufacturing** (chemicals; and petroleum, coal and plastics); and **services** (business services; and engineering and management services). Over the year, employment gains have been in **finance, insurance, and real estate** (banking); and **transportation and public utilities**.

Delaware shows a loss of 4,000 jobs during the first six months of this year, compared to the same period a year ago. For the second half of the year we have a dim outlook on any significant turnaround in the State's job market. Key industries to economic recovery, such as contract construction, chemicals, finance, and business services, are no where near a turnaround. Particularly troubling is the general weakness in the service producing sectors such as retail trade. The service sectors have been very hard hit in the mid-atlantic region and New England states.

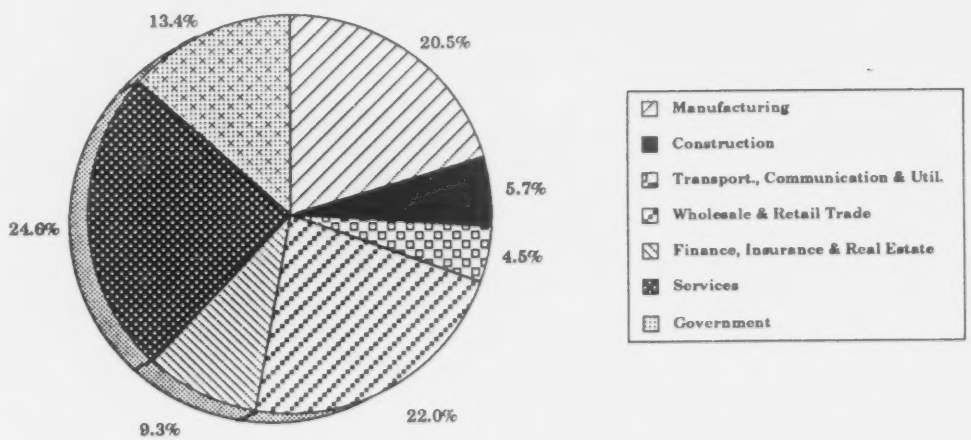
Over the next several months, the Delaware Department of Labor anticipates no permanent job growth. There may be slight temporary gains in industries that usually have summer gains, such as food processing. Expectation for gains in the job market have been dampened by recently announced layoffs and mergers in the financal sector as well as cost cutting measures by the State's largest private employer, the E. I. du Pont de Nemours Company.



Net Job Change By Sector, Delaware June 1990 To June 1991



Percent Of Total Employment By Sector, Delaware, June 1991



Delaware Nonagricultural Employment by Selected Industry

INDUSTRY GROUP	Jun 91	May 91	Jun 90	Net Change to Jun 1991 from: May 91	Jun 90
TOTAL NONAG. EMPLOYMENT	349.6	346.3	354.7	3.3	-5.1
GOODS PRODUCING	91.6	91.0	94.7	0.6	-3.1
MINING	0.1	0.1	0.1	0.0	0.0
CONTRACT CONSTRUCTION	19.8	19.3	21.2	0.5	-1.4
General Building Contractors	4.8	4.7	5.3	0.1	-0.5
Heavy Construction Contractors	4.1	4.0	3.8	0.1	0.3
Special Trade Contractors	10.9	10.6	12.1	0.3	-1.2
MANUFACTURING	71.7	71.6	73.4	0.1	-1.7
Durable Goods	18.6	18.6	18.8	0.0	-0.2
Primary & Fabricated Metals	3.1	3.1	3.2	0.0	-0.1
Machinery & Electrical Equipment	1.9	1.8	1.9	0.1	0.0
Transportation Equipment	8.0	8.1	7.8	-0.1	0.2
Instruments & Related Products	3.0	3.0	3.1	0.0	-0.1
Other Durable Goods	2.6	2.6	2.8	0.0	-0.2
Nondurable Goods	53.1	53.0	54.6	0.1	-1.5
Food & Kindred Products	9.3	9.1	9.1	0.2	0.2
Textile, Apparel, Leather	1.6	1.6	1.6	0.0	0.0
Paper, Printing, Publishing	5.2	5.1	5.3	0.1	-0.1
Chemicals	33.2	33.4	34.5	-0.2	-1.3
Petroleum, Coal, Plastics	3.8	3.8	4.1	0.0	-0.3
SERVICE PRODUCING	258.0	255.3	260.0	2.7	-2.0
TRANSPORTATION & PUBLIC UTILITIES	15.7	15.3	15.5	0.4	0.2
Transportation	10.4	10.0	10.3	0.4	0.1
Railroad Transportation	1.4	1.4	1.4	0.0	0.0
Local & Interurban Passenger Trans.	1.7	1.7	1.8	0.0	-0.1
Trucking & Warehousing	5.0	4.8	4.9	0.2	0.1
Other Transportation	2.3	2.1	2.2	0.2	0.1
Communications & Utilities	5.3	5.3	5.2	0.0	0.1
Communications	2.2	2.2	2.2	0.0	0.0
Electrical, Gas & Sanitary Services	3.1	3.1	3.0	0.0	0.1
WHOLESALE & RETAIL TRADE	76.9	74.9	77.8	2.0	-0.9
Wholesale Trade	13.3	13.4	13.4	-0.1	-0.1
Wholesale-Durable	7.6	7.6	7.7	0.0	-0.1
Wholesale-Nondurable	5.7	5.8	5.7	-0.1	0.0
Retail Trade	63.6	61.5	64.4	2.1	-0.8
Building Material & Garden Supplies	2.7	2.7	3.0	0.0	-0.3
General Merchandise Stores	8.5	8.2	8.7	0.3	-0.2
Food Stores	9.7	9.4	9.6	0.3	0.1
Auto Dealers & Service Stations	6.6	6.7	6.8	-0.1	-0.2
Apparel & Accessory Stores	3.6	3.5	3.5	0.1	0.1
Furniture & Home Furnishings	2.5	2.5	2.6	0.0	-0.1
Eating & Drinking Places	21.4	20.0	21.6	1.4	-0.2
Miscellaneous Retail	8.6	8.5	8.6	0.1	0.0

Cont'd

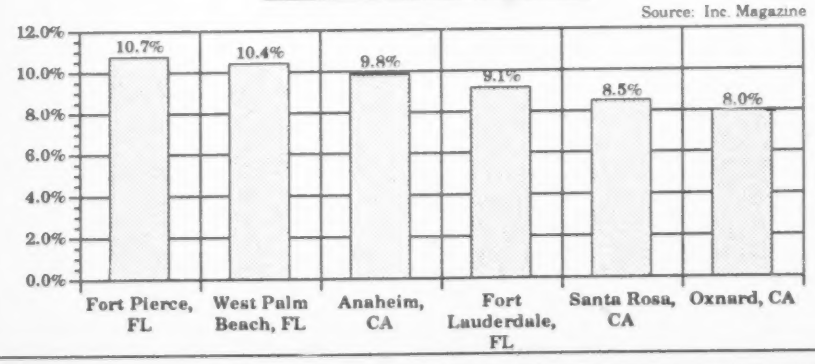
Delaware Nonagricultural Employment by Selected Industry

INDUSTRY GROUP	Jun 91	May 91	Jun 90	Net Change to Jun 1991 from: May 91	Jun 90
FINANCE, INSURANCE & REAL ESTATE	32.5	32.3	32.3	0.2	0.2
Finance	23.4	23.3	22.9	0.1	0.5
Depository Institutions	20.4	20.3	19.9	0.1	0.5
Other Finance	3.0	3.0	3.0	0.0	0.0
Insurance	5.7	5.7	5.7	0.0	0.0
Real Estate	3.4	3.3	3.7	0.1	-0.3
SERVICES	86.1	84.9	86.8	1.2	-0.7
Hotels & Other Lodging Places	3.3	3.2	3.3	0.1	0.0
Personal Services	3.0	3.0	3.0	0.0	0.0
Business Services	20.5	20.5	21.3	0.0	-0.8
Automobile & Miscellaneous Repair	3.7	3.6	3.8	0.1	-0.1
Amusement & Recreation Services	4.5	3.8	4.0	0.7	0.5
Health Services	22.8	22.5	22.6	0.3	0.2
Hospitals	11.5	11.4	11.3	0.1	0.2
Other Health Services	11.3	11.1	11.3	0.2	0.0
Legal Services	2.8	2.8	3.0	0.0	-0.2
Educational Services	4.0	4.1	3.8	-0.1	0.2
Social Services	7.0	6.9	6.8	0.1	0.2
Engineering & Management Services	5.4	5.4	5.8	0.0	-0.4
Membership Organizations	5.6	5.5	5.7	0.1	-0.1
Other Services	3.5	3.6	3.7	-0.1	-0.2
GOVERNMENT	46.8	47.9	47.6	-1.1	-0.8
Federal Government	6.0	5.9	6.6	0.1	-0.6
State & Local Government	40.8	42.0	41.0	-1.2	-0.2
State Government	22.7	24.2	22.5	-1.5	0.2
State Education	8.5	9.7	8.0	-1.2	0.5
State Non-Education	14.2	14.5	14.5	-0.3	-0.3
Local Government	18.1	17.8	18.5	0.3	-0.4
Local Education	13.5	13.4	13.1	0.1	0.4
Local Non-Education	4.6	4.4	5.4	0.2	-0.8
Persons Involved In Work Stoppages	0.0	0.0	0.0	0.0	0.0

Current Data Preliminary; Previous Month Revised

Most Job Growth 1988-1990

Source: Inc. Magazine



Hours and Earnings of Production Workers in Manufacturing Industries

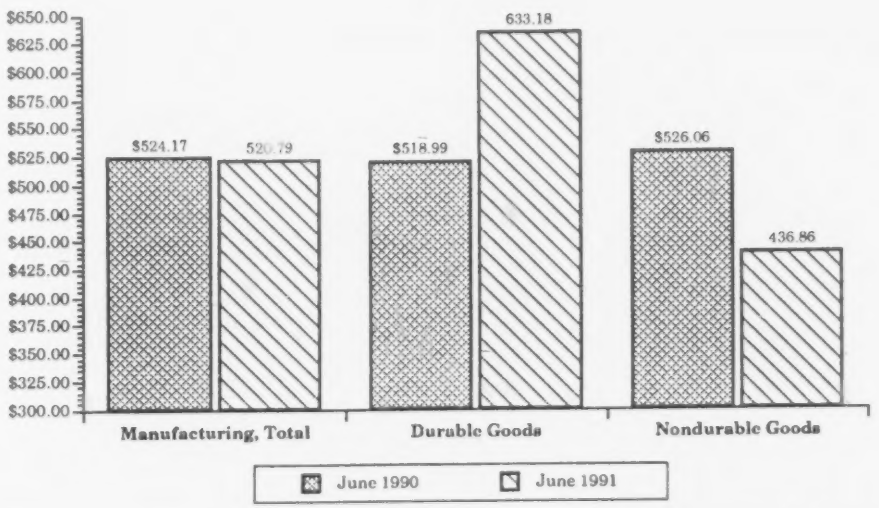
Delaware*

	Weekly Earnings			Weekly Hours			Hourly Earnings		
	Jun-91	May-91	Jun-90	Jun-91	May-91	Jun-90	Jun-91	May-91	Jun-90
MANUFACTURING	$ 520.79	$ 506.17	$ 524.17	41.3	40.3	41.8	$12.61	$ 12.56	$ 12.54
DURABLE GOODS	633.18	611.25	518.99	42.1	40.4	39.8	15.04	15.13	13.04
Primary & Fabricated Metals	491.71	436.21	403.51	41.6	37.8	39.1	11.82	11.54	10.32
Machinery & Electrical Equipment	572.10	528.77	517.85	44.8	40.8	39.5	12.77	12.96	13.11
Transportation Equipment	791.93	784.83	631.54	42.6	42.7	40.2	18.59	18.38	15.71
Instruments & Related	395.24	369.40	370.54	41.3	38.6	39.8	9.57	9.57	9.31
Other Durable Goods	380.25	344.40	356.45	39.9	35.8	39.3	9.53	9.62	9.07
NONDURABLE GOODS	436.86	428.93	526.06	40.6	40.2	42.7	10.76	10.67	12.32
Food & Kindred Products	322.40	330.08	341.94	40.3	40.6	41.7	8.00	8.13	8.20
Textile, Apparel, Leather	363.69	335.78	359.98	40.5	38.2	41.0	8.98	8.79	8.78
Paper, Printing, and Publishing	431.26	398.22	405.08	38.3	36.4	38.0	11.26	10.94	10.66
Chemicals	649.32	634.69	653.50	42.0	42.2	43.8	15.46	15.04	14.92
Petroleum, Coal, Plastics	444.52	429.22	488.67	41.7	40.8	45.5	10.66	10.52	10.74

*Covers an estimated 32,900 Production Workers

Current Data Preliminary; previous month revised

Delaware Average Weekly Earnings for Manufacturing Production Workers



The Department of Labor Serving You Better. . .

Division of Vocational Rehabilitation

On July 26, regulations were released regarding the Americans with Disabilities Act of 1990 (ADA). This wide-ranging act provides Civil Rights protection for 43 million U.S. citizens with disabilities.

ADA has five parts:

Title I—Employment: Prohibits discrimination in application procedures, promotion, hiring, or discharge of employees in all terms, conditions, and privileges of employment. This goes into effect July 26, 1992 for employers with 25 or more employees and July 26, 1994 for employers with 15 or more employees.

Title II—Public Service: Requires that all private and public transportation systems be accessible to all people including individuals with disabilities.

Title III—Public Accommodations: No individual shall be discriminated against on the basis of disability in the full and equal enjoyment of goods, services, facilities, privileges, advantages, and any place offering public accommodations.

Title IV—Telecommunications: requires a telephone relay system for people with hearing or speech impairments.

Title V—Miscellaneous Provisions: Other State and Federal laws providing equal or greater protection for the rights of individuals with disabilities are valid and will remain.

On October 2, the Governor's Committee on Employment of People with Disabilities will host a seminar at the University of Delaware's Clayton Hall to answer questions about ADA. For more information please call Diane Treacy at (302) 577-2850.

Division of Employment and Training

On September 30, the Division of Employment and Training will display and demonstrate the new Touch-Screen Automated Labor Exchange System (ALEX) at the University of Delaware's 23rd Annual Job Jamboree.

ALEX is a computer-based system that gives job seekers greater access to information on employment opportunities. Touch-Screen ALEX allows a job seeker to access computerized job information by simply touching a computer screen to execute computer commands. An accompanying video instructs the job seeker how to use the system.

Governor Michael N. Castle unveiled the new touch-screen version of ALEX earlier this year in Legislative Hall. "In this difficult economic time, providing job opportunities to the public is critical. ALEX delivers existing labor market information quickly and easily."

The Touch-Screen unit requires no computer knowledge and gives users a printout of general information on a chosen job that can be taken to a Department of Labor, Employment and Training local office for more information. The system gives the job seeker an opportunity to search through thousands of openings for jobs locally, regionally, and nationally that match his or her own skills, experience, and interests.

"This is one of the many initiatives that the Department of Labor is currently involved with to increase the quality of Delaware's labor force," said Labor Secretary Jan Ewing Robinson. "This advanced technology allows us to access jobs locally that are available through the interstate job bank."

In addition to the touch-screen version, ALEX is available through self-service keyboard terminals at the Department of Labor, Employment and Training local offices, the Department of Labor's Pencader office, the Veterans Administration Building in Elsmere, the Dover Air Force Base, and for disabled clients, the Division of Vocational Rehabilitation's Wilmington office. For more information call (302) 368-6897.

The Implications of a Changing Population on Delaware's Workforce

Historically, the 1980s will be remembered as a decade of dramatic change and economic prosperity for Delaware. In 1990, the recession started and the State's record expansion ended. Delaware's good fortune, however, created a population surge during the 80s of over 70,000 people and left the State with many interesting implications. Our population is older, more women are working than ever before, and once again, as happened in the 1960s, the number of young children has been growing.

What does this mean for the future of our workforce?

From 1980 to 1990, Delaware's population increased 12.1% from 594,338 to 666,168, compared to much slower growth in the 70s of 8.4 percent. In addition to this growth, Delaware's economy expanded significantly in the 80s with an increase of 87,200 jobs.

Delaware Population Trends By County

	1980	1990	Change 1980-1990 Number	Percent
Totals	594,338	666,168	71,830	12.1
New Castle	398,115	441,946	43,831	11.0
Kent	98,219	110,993	12,774	13.0
Sussex	98,004	113,229	15,225	15.5

Source: Bureau of the Census and the Delaware Data Center

Between 1980 and 1990, Delaware's labor force participation rate rose from 64.4% to 69.9%. The labor force participation rate accounts for all non-military people, over the age of 16, who are working or actively seeking work. The 80s saw a large influx of women into the labor force, spurring on Delaware's record economic expansion. During this period, women's participation increased from 52.2% early in the decade to 61.9% at the end.

In the late 1980s rapid job growth, coupled with high labor force participation rates, led to a very tight labor market. Simply put, there were more jobs than qualified people to fill them. The current recession has changed that situation to one where highly trained and educated job applicants are plentiful. The labor situation is expected to once again tighten by th mid-1990s as the number of available new entrants to the labor force is projected to decline.

During the 80s, New Castle County saw the largest net increase in population with a gain of 43,831 people. In 1990, New Castle County comprised about two-thirds of the State's population. Reasons for continued county growth include the success of the Financial Center Development Act, which brought dozens of out-of-state banks to the State. Most of these new financial institutions came to New Castle County and spurred rapid growth not only in finance but also in support areas such as construction, retail trade, and business services. These same industries have fallen on hard times during our current recessionary period.

While New Castle County saw the largest growth in the 80s, Sussex County experienced the fastest growth at 15.5%. This growth is attributed to economic successes primarily in the food processing and tourism industries. Construction also benefited as people had more disposable income to spend on beach homes, boats, and recreational activities.

While Delaware's population grew during the 1980s, it also aged. The median age in 1980 was 30.8 years compared to 32.9 in 1990. One of the fastest growing segments of Delaware's population is the over-65 age group (with an increase of 36.4% over the decade).

Implications of Delaware's aging population include:

- Need for expansion of the health care industry (health care providers, nursing homes, home health care).
- Need to retain and retrain older workers to alleviate future labor shortages.

- Need for increased services for older people such as improved mass transportation systems, meals on wheels, senior centers.
- Need for reasonable retirement living--at all levels of nursing care (condos, retirement villages), home maintenance, personal services.

The baby boom generation (ages 25-44) is another fast growing segment of Delaware's population with growth of 33.5% during the 80s. This age group falls into a category now known as the "sandwich generation." In addition to raising their own children, with the problem of finding competent child care, this group must also cope with parents in need of caregiving. Baby boomers are also very health conscience with an emphasis on preventive medicine techniques (healthy lifestyle and recreational services. This group dominates the Delaware labor force, which, in turn, blocks advancement opportunities into mid-level management positions by younger workers.

Delaware Population by Age Groups, 1980 and 1990

	1980	1990	Change 1980-1990 Number	Percent
Totals	594,338	666,168	71,830	12.1
Under 5 years	41,151	48,824	7,673	18.6
5 to 17	125,444	114,517	-10,927	-8.7
18 to 24	83,373	76,233	-7,140	-8.6
25 to 44	163,304	217,981	54,677	33.5
45 to 54	63,210	68,114	4,904	7.8
55 to 64	58,677	59,764	1,087	1.9
65 and over	59,179	80,735	21,556	36.4

Source: Bureau of the Census and the Delaware Data Center

During the 1980s there was a considerable decline in the number of 18-24 year olds in Delaware. In 1980 there were 83,373 18-24 year-olds, compared to 76,233 in 1990. This age group represents a new era following the baby boom generation. As a result, there was a labor shortage in the mid-to-late 80s in certain entry-level part-time jobs (retailing). While the recession has temporarily alleviated the labor shortage, it is important that anyone entering the labor market have the best possible skills to compete. Those who lack proper training and skills won't be able to find meaningful employment that offers stability and a chance for advancement.

Since 1980, the number of 5- to 17- year-olds has dropped 8.7%. School enrollments declined resulting in school closures. This trend is starting to reverse itself, and the school age population is increasing (especially in the younger age groups). The need for more schools and teachers has begun and should continue through the year 2000. (Note: earlier this summer, the State's Early Retirement Option (ERO) created an immediate need for over 1,000 educators. Most of these openings have already been filled).

Since 1980 the number of children ages 0-5 has grown 18.6%. As a result, there will be an increased need for schools (teachers, bus drivers, etc.); child care (in order to attract and retain women in the labor force); and health care (pediatricians).

As we head for the year 2000, Delaware's political, demographic, and physical makeup will continue to take many turns. We're faced with an aging population, a glut of baby boomers, and fewer young people entering the workforce. Currently, we're faced with layoffs and an extremely difficult employment picture.

In the long run, however, once the economy rebounds and the labor market adjusts, jobs will be available. The Delaware Department of Labor's role is to insure our workforce is adequately trained and prepared for the widespread challenges that lie ahead.

Unemployment Insurance Statistics

	June 1991	May 1991	June 1990	% Change From Prior Month	% Change From Year Ago
Initial Claims-Total *	3,356	6,557	2,959	-49%	13%
Auto Makers	0	3,181	0	-100%	******
Non-Auto	3,356	3,376	2,959	-1%	13%
Weeks Claimed **	25,084	32,091	14,551	-22%	72%
Auto Makers	0	3,415	0	-100%	******
Non-Auto	25,084	28,676	14,551	-13%	72%
First Payments #	1,272	1,409	1,043	-10%	22%
Final Payments ##	386	486	284	-21%	36%
Weeks Compensated @	23,317	31,514	13,547	-26%	72%
Amount Compensated	3,889,433	5,404,275	2,165,525	-28%	80%
Average Weekly Check Amount	167	171	160	-3%	4%

* **Initial Claims** include New Initial Claims and Additional Initial Claims. A New Initial Claim is filed when a person becomes unemployed and files for unemployment insurance for the very first time in a benefit year. Additional Initial Claims are filed when someone has already filed a New Initial Claim due to unemployment, returned to work for at least a week, and then become unemployed again.

** **Weeks Claimed** account for the total number of weeks claimed for unemployment insurance within a given month.

\# **First Payments** are New Initial Claims that receive unemployment compensation checks.

\## **Final Payments** occur when a claimant receives the last check in his or her benefit cycle (not to exceed one year).

@ **Weeks Compensated** account for the number of Weeks Claimed that were paid during the month.

Initial Claims in June dropped to about half of their May level due to a return to work at the state's auto plants. Excluding auto makers, initial claims remained virtually unchanged, dropping only 1%. This presents a mixed signal on the state of the economy. Over the last 10 years, initial claims in Delaware have tended to rise from May to June due to school-related layoffs (school bus drivers, crossing guards, etc.); a decrease of 1% can therefore be seen in a positive light. However, the level of initial claims is the highest for the month since June 1982 and shows few signs for a serious decline anytime soon.

Compared to June 1990, initial claims are up 13% while weeks claimed are up by 72%. As we enter August and September and start comparing these months with the same periods in 1990, the difference in the number of initial claims and weeks claimed won't be as great since both periods fall within the current recession. At this time last year we were just entering the recession, therefore initial claims and weeks claimed hadn't yet reached recessionary levels.

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Delaware Digest

Labor Market Monthly

Volume 1, No.4 August, 1991

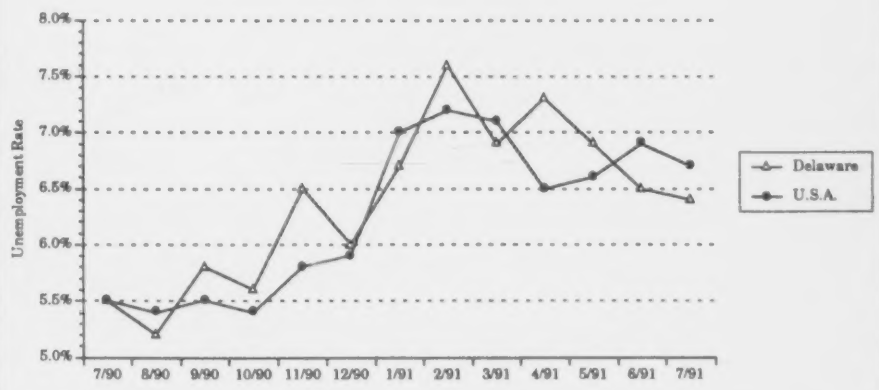
Delaware Department of Labor
Office of Occupational & Labor Market Information

Delaware's Unemployment Rate Continues Downward Movement

Delaware's unemployment rate dropped to 6.4% in July, 1991 from 6.5% in June, 1991 due to a modest decline in the number of jobless people. The rate in July, 1990 was lower at 5.5%. The number of jobless Delawareans in July, 1991 was 23,500 compared to 24,100 in June, 1991. From July, 1990 to July, 1991, Delaware's labor force, which includes individuals over the age of 16 who are working or actively seeking work, rose from 366,500 to 368,000.

Total nonagricultural employment fell by 3,300 over the month to 346,700 jobs. Over-the-month job losses were in government, services, transportation and public utilities. Over-the-month job gains were in contract construction, due to modest gains in general building and special trades.

Unemployment Rate-Delaware and U.S.A.
July 1990-July 1991



For information about the unemployment rate, occupational projections, women in the workforce, the Delaware Occupational Information System (OIS), or any other Labor Market Information, contact the Office of Occupational and Labor Market Information at (302) 368-6960.

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Labor Force Trends

Delaware's unemployment rate dropped slightly to 6.4% in July 1991 from 6.5% the previous month, due to a modest decline in the number of unemployed people. The rate in July, 1990 was lower at 5.5%. Delaware's July 1990 unemployment statistics were impacted by the layoff of 4,100 auto workers due to a model changeover at the State's two auto assembly plants. This year, model changeover occurred primarily in August and will affect that month's jobless rate. The number of jobless Delawareans in July, 1991 was 23,500 compared to 24,100 in June, 1991.

Nationally, the unemployment rate was 6.7% in July, 1991, the second month in a row that Delaware's rate was lower than the U.S. figure. For the first seven months of this year, Delaware's unemployment rate averaged 6.9%, equalling the U.S. figure. In August, Delaware's rate may be higher due to the auto industry layoffs, but should track closely to the national rate during the latter part of 1991.

From July, 1990 to July, 1991, the State's labor force rose slightly from 366,500 to 368,000. The labor force includes people, over the age of 16, who are working or actively seeking work. The estimate of employed Delaware residents is down over the year from 346,300 to 344,600.

All areas and counties in Delaware are experiencing higher unemployment rates compared to a year ago. The area with the highest unemployment in July, 1991 was the city of Wilmington with a rate of 9.1%. Kent County had the highest county rate at 8.1%. Sussex County had the lowest rate at 5.7% as a result of seasonal activity in agriculture, food processing, and the summer resort season.

Recent national economic news does not bode well for the local economy. According to the U.S. Department of Commerce, the economy continued to decline in the second quarter as the Gross National Product declined by 0.1% (revised from a previous estimate of a 0.4% gain). In July, new and existing home sales declined, while personal income fell by 0.1% after five consecutive monthly increases.

Delaware's Civilian Labor Force

	July 1991	June 1991	July 1990
Civilian Labor Force	368,042	368,487	366,474
Employment	344,555	344,393	346,348
Unemployment	23,487	24,094	20,126
Unemployment Rate	6.4	6.5	5.5
National Unemployment Rate	6.7	6.9	5.5

At the local level, July initial unemployment claims (non-auto related) were up 41% over the month and 50% higher than in July, 1990. These statistics are broadbased across many industries and indicate a continued general weakness in a labor market which shows virtually no positive signs.

During the remainder of 1991, the job market will continue to be affected by downsizing and restructuring. For this reason, as well as the ones previous mentioned, the unemployment rate will remain relatively high for several months to come.

Local Area Unemployment Statistics

July, 1991 - Preliminary

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide	368,042	344,555	23,487	6.4
2. Wilmington, PMSA	316,141	295,709	20,432	6.5
3. New Castle County	246,004	230,720	15,284	6.2
4. Balance of NCC (1)	211,661	199,494	12,167	5.7
5. Wilmington City	34,343	31,226	3,117	9.1
6. Newark City	14,066	12,883	1,183	8.4
7. Kent County	52,447	48,214	4,233	8.1
8. Sussex County	69,589	65,620	3,969	5.7
9. United States (000's) (Non-Seasonal)	127,327	118,751	8,576	6.7
10. United States (000's) (Seasonal)	125,214	116,712	8,501	6.8

June, 1991 - Final

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide	368,487	344,393	24,094	6.5
2. Wilmington, PMSA	316,535	295,242	21,293	6.7
3. New Castle County	247,395	231,416	15,979	6.5
4. Balance of NCC (1)	212,867	200,096	12,771	6.0
5. Wilmington City	34,528	31,320	3,208	9.3
6. Newark City	14,184	12,922	1,262	8.9
7. Kent County	52,846	48,271	4,575	8.7
8. Sussex County	68,246	64,706	3,540	5.2
9. United States(000's)(Non-Seasonal)	127,054	118,280	8,774	6.9
10. United States (000's) (Seasonal)	125,629	116,884	8,745	7.0

(1) Balance of NCC equals New Castle County minus Wilmington City

NOTE: Due to rounding, totals may not add and data may not match similar statistics published in various other state or National releases.

Industry Trends

Between June and July of this year, Delaware's nonagricultural employment fell by 3,300 to 346,700 jobs. The loss was due mostly to seasonal employment decreases attributed to the end of the school year.

Job losses were in **government** (seasonal decreases for state and local education); **services** (amusement and recreational services; and private education); and **transportation and public utilities** (local and interurban transportation). The only significant over-the-month job gains were in **contract construction**, due to modest gains in general building and special trades.

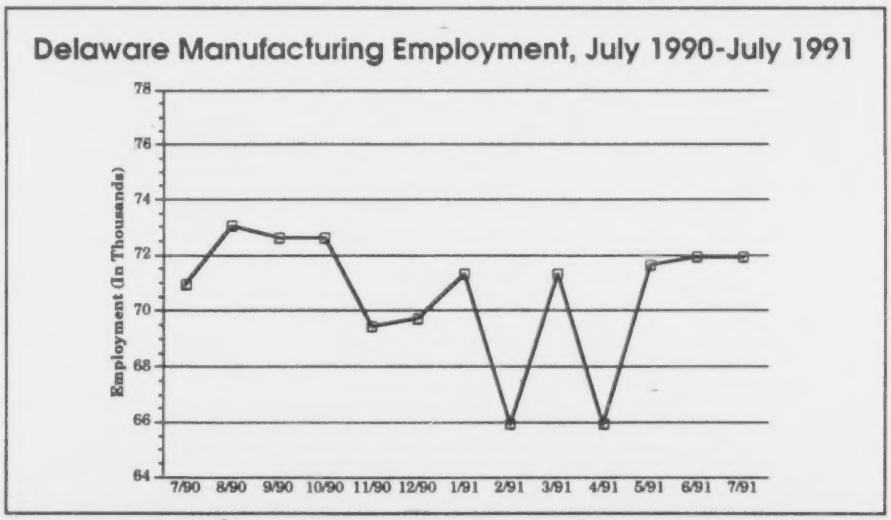
As in most prior years, there is usually a significant seasonal over-the-month job loss from June to July. During the past eight years, the June-to-July loss has averaged 2,500 jobs. A weak economy has inflated the June-July job loss for 1991 to 3,300 jobs. Industries that would normally grow over the summer months such as retail, finance, and business services lack significant growth this year.

Since July, 1990, total nonagricultural employment has declined by 0.7% or 2,500 jobs. In July of last year, both auto plants were closed due to the annual model changeover, while in July of this year both plants were operating. If the plants had been open in July of 1990, the employment decline from July 1990 to July 1991 would have been much greater.

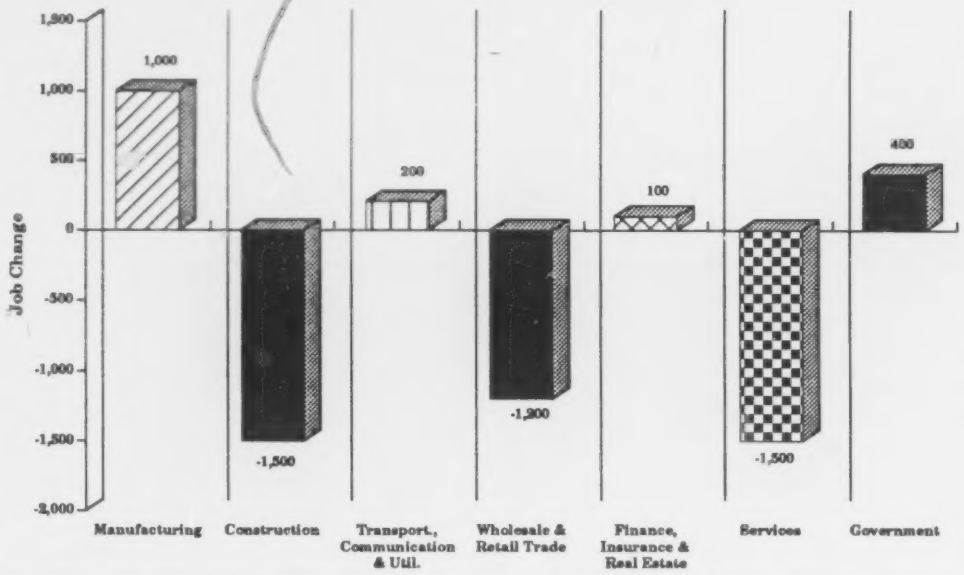
Job losses since July of last year have been in **contract construction** (general building; and special trades); **services** (business services; and engineering and management services); **wholesale and retail trade** (building materials; general merchandise stores; auto dealers; and eating and drinking places). Over-the-year employment gains have been in **government** (state education); and **manufacturing** (employment in auto plants was lower in July, 1990 due to retooling).

Delaware experienced a loss of 3,800 jobs, a decline of 1.1%, during the first seven months of this year, compared to the same period a year ago. Nationally, the decline in jobs during the first seven months was 0.9%. The region consisting of Maryland, Pennsylvania, New York, and New Jersey was down by 1.4%.

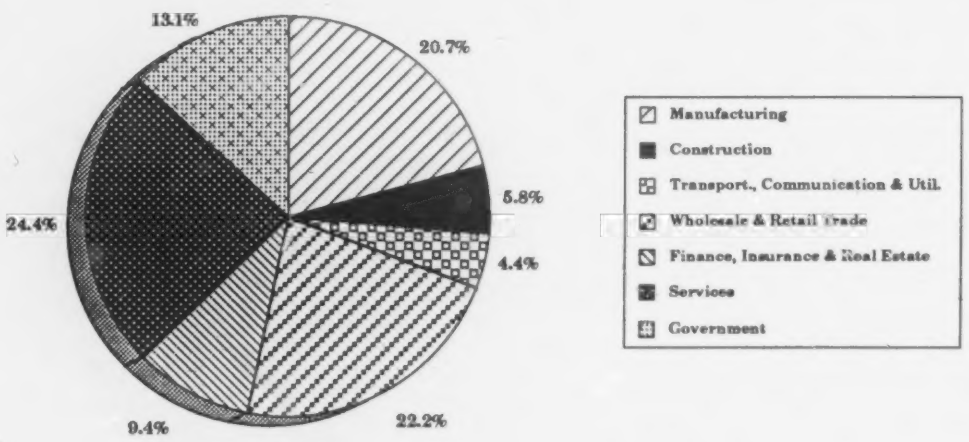
In future months, model changeovers in the auto industry will cause temporary layoffs, which will further reduce the number of jobs. For the balance of the year, any major turnaround for Delaware's key industries, such as finance, business services, chemicals, and contract construction, does not seem likely. It seems certain that 1991 will show the first net loss in non-farm jobs since the severe recession of 1975.



Net Job Change by Sector, Delaware, July 1990 -July 1991



Percent of Total Employment by Sector, Delaware, July 1991



Delaware Nonagricultural Employment by Selected Industry

INDUSTRY GROUP	Jul 91	Jun 91	Jul 90	Net Change to July 1991 from: Jun 91	Jul 90
TOTAL NONAG. EMPLOYMENT	346.7	350.0	349.2	-3.3	-2.5
GOODS PRODUCING	92.0	91.8	92.5	0.2	-0.5
MINING	0.1	0.1	0.1	0.0	0.0
CONTRACT CONSTRUCTION	20.0	19.8	21.5	0.2	-1.5
General Building Contractors	4.8	4.7	5.4	0.1	-0.6
Heavy Construction Contractors	4.2	4.2	3.7	0.0	0.5
Special Trade Contractors	11.0	10.9	12.4	0.1	-1.4
MANUFACTURING	71.9	71.9	70.9	0.0	1.0
Durable Goods	18.5	18.6	16.0	-0.1	2.5
Primary & Fabricated Metals	3.0	3.1	3.3	-0.1	-0.3
Machinery & Electrical Equipment	1.8	1.9	1.9	-0.1	-0.1
Transportation Equipment	8.0	8.0	4.9	0.0	3.1
Instruments & Related Products	3.0	3.0	3.1	0.0	-0.1
Other Durable Goods	2.7	2.6	2.8	0.1	-0.1
Nondurable Goods	53.4	53.3	54.9	0.1	-1.5
Food & Kindred Products	9.3	9.3	9.4	0.0	-0.1
Textile, Apparel, Leather	1.5	1.6	1.6	-0.1	-0.1
Paper, Printing, Publishing	5.1	5.2	5.3	-0.1	-0.2
Chemicals	33.7	33.4	34.6	0.3	-0.9
Petroleum, Coal, Plastics	3.8	3.8	4.0	0.0	-0.2
SERVICE PRODUCING	254.7	258.2	256.7	-3.5	-2.0
TRANSPORTATION & PUBLIC UTILITIES	15.2	15.6	15.0	-0.4	0.2
Transportation	9.9	10.3	9.8	-0.4	0.1
Railroad Transportation	1.4	1.4	1.4	0.0	0.0
Local & Interurban Passenger Trans.	1.3	1.7	1.3	-0.4	0.0
Trucking & Warehousing	5.0	5.0	4.9	0.0	0.1
Other Transportation	2.2	2.2	2.2	0.0	0.0
Communications & Utilities	5.3	5.3	5.2	0.0	0.1
Communications	2.2	2.2	2.2	0.0	0.0
Electrical, Gas & Sanitary Services	3.1	3.1	3.0	0.0	0.1
WHOLESALE & RETAIL TRADE	77.1	77.1	78.3	0.0	-1.2
Wholesale Trade	13.5	13.5	13.6	0.0	-0.1
Wholesale-Durable	7.7	7.7	7.7	0.0	0.0
Wholesale-Nondurable	5.8	5.8	5.9	0.0	-0.1
Retail Trade	63.6	63.6	64.7	0.0	-1.1
Building Material & Garden Supplies	2.8	2.8	3.0	0.0	-0.2
General Merchandise Stores	8.3	8.5	8.7	-0.2	-0.4
Food Stores	9.7	9.6	9.8	0.1	-0.1
Auto Dealers & Service Stations	6.6	6.6	6.8	0.0	-0.2
Apparel & Accessory Stores	3.7	3.6	3.6	0.1	0.1
Furniture & Home Furnishings	2.5	2.5	2.6	0.0	-0.1
Eating & Drinking Places	21.3	21.4	21.6	-0.1	-0.3
Miscellaneous Retail	8.7	8.6	8.6	0.1	0.1

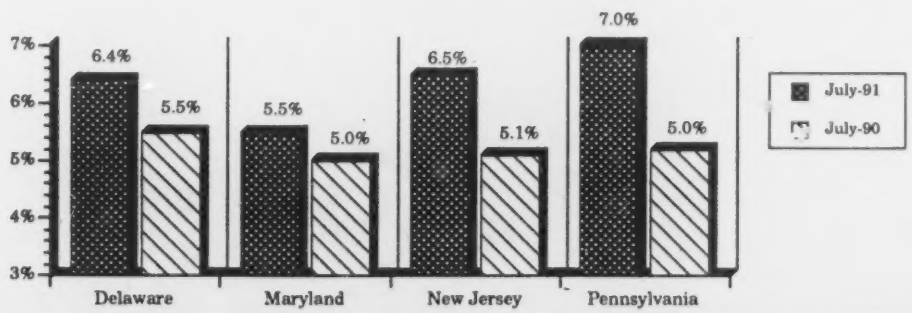
Cont'd

Delaware Nonagricultural Employment by Selected Industry

INDUSTRY GROUP	Jul 91	Jun 91	Jul 90	Net Change to July 1991 from: Jun 91	Jul 90
FINANCE, INSURANCE & REAL ESTATE	32.5	32.6	32.4	-0.1	0.1
Finance	23.4	23.5	23.0	-0.1	0.4
Depository Institutions	20.4	20.5	20.0	-0.1	0.4
Other Finance	3.0	3.0	3.0	0.0	0.0
Insurance	5.7	5.7	5.7	0.0	0.0
Real Estate	3.4	3.4	3.7	0.0	-0.3
SERVICES	84.6	85.9	86.1	-1.3	-1.5
Hotels & Other Lodging Places	3.2	3.3	3.4	-0.1	-0.2
Personal Services	3.0	3.0	3.0	0.0	0.0
Business Services	20.4	20.5	21.1	-0.1	-0.7
Automobile & Miscellaneous Repair	3.6	3.7	3.8	-0.1	-0.2
Amusement & Recreation Services	4.1	4.5	3.9	-0.4	0.2
Health Services	22.8	22.7	22.6	0.1	0.2
Hospitals	11.6	11.5	11.3	0.1	0.3
Other Health Services	11.2	11.2	11.3	0.0	-0.1
Legal Services	2.8	2.9	3.0	-0.1	-0.2
Educational Services	3.5	4.0	3.3	-0.5	0.2
Social Services	6.9	6.9	6.8	0.0	0.1
Engineering & Management Services	5.3	5.3	5.8	0.0	-0.5
Membership Organizations	5.5	5.6	5.7	-0.1	-0.2
Other Services	3.5	3.5	3.7	0.0	-0.2
GOVERNMENT	45.3	47.0	44.9	-1.7	0.4
Federal Government	6.0	6.0	6.7	0.0	-0.7
State & Local Government	39.3	41.0	38.2	-1.7	1.1
State Government	22.5	22.9	21.7	-0.4	0.8
State Education	7.7	8.7	6.9	-1.0	0.8
State Non-Education	14.8	14.2	14.8	0.6	0.0
Local Government	16.8	18.1	16.5	-1.3	0.3
Local Education	11.2	13.5	11.0	-2.3	0.2
Local Non-Education	5.6	4.6	5.5	1.0	0.1
Persons Involved In Work Stoppages	0.0	0.0	0.0	0.0	0.0

Current Data Preliminary; Previous Month Revised

Regional Unemployment Rates



Hours and Earnings of Production Workers in Manufacturing Industries

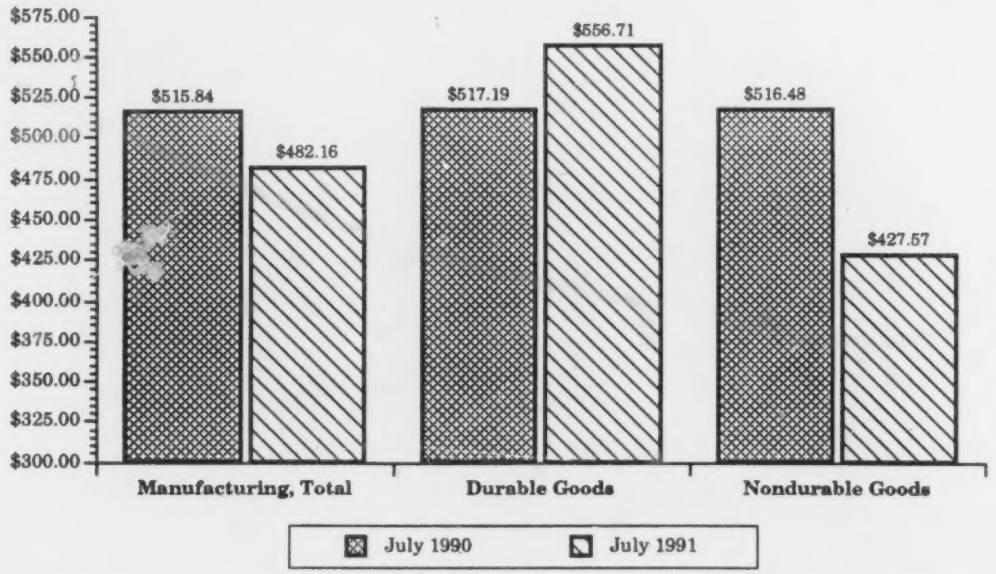
Delaware*

	Weekly Earnings			Weekly Hours			Hourly Earnings		
	Jul-91	Jun-91	Jul-90	Jul-91	Jun-91	Jul-90	Jul-91	Jun-91	Jul-90
MANUFACTURING	$ 482.16	$ 519.99	$ 515.84	39.2	41.8	41.4	$12.30	$ 12.44	$ 12.46
DURABLE GOODS	556.71	633.03	517.19	38.5	42.4	39.3	14.46	14.93	13.16
Primary & Fabricated Metals	452.35	487.34	396.55	38.4	41.3	38.5	11.78	11.80	10.30
Machinery & Electrical Equipment	604.83	570.37	494.62	46.1	44.7	39.1	13.12	12.76	12.65
Transportation Equipment	661.56	792.82	711.42	37.0	43.3	39.9	17.88	18.31	17.83
Instruments & Related	392.22	395.24	369.47	41.2	41.3	39.6	9.52	9.57	9.33
Other Durable Goods	360.96	378.74	351.40	38.4	39.7	38.7	9.40	9.54	9.08
NONDURABLE GOODS	427.57	436.95	516.48	39.7	41.3	42.3	10.77	10.58	12.21
Food & Kindred Products	317.19	322.49	355.32	39.5	42.1	42.1	8.03	7.66	8.44
Textile, Apparel, Leather	296.94	362.30	369.82	29.4	40.3	41.6	10.10	8.99	8.89
Paper, Printing, and Publishing	434.50	431.26	441.98	39.5	38.3	38.4	11.00	11.26	11.51
Chemicals	632.88	649.18	633.89	41.5	42.1	42.6	15.25	15.42	14.88
Petroleum, Coal, Plastics	445.77	445.36	498.96	41.7	41.7	46.2	10.69	10.68	10.80

*Covers an estimated 32,900 Production Workers

Current Data Preliminary; previous month revised

Delaware Average Weekly Earnings for Manufacturing Production Workers



The Department of Labor Serving You Better...

Office of Occupational and Labor Market Information

Like many Eastern Seaboard states, Delaware's labor market lost momentum in 1990, with higher unemployment and minimal job growth, a new Delaware Department of Labor study indicates.

Delaware Labor Market 1990: The Year in Brief outlines 1990 job growth and decline in Delaware as well as unemployment figures, average weekly wages, per capita and total personal income figures, and unemployment insurance claims data. "The recession has taken its toll on the Mid-Atlantic Region," said James K. McFadden, Chief, Office of Occupational and Labor Market Information, Delaware Department of Labor. "In 1990, Delaware saw minimal growth of 1,900 jobs, compared to 9,200 in 1989."

Of the 1,900 jobs created in 1990, the most significant gains were found in Services (business, health, engineering and management services), Finance Insurance and Real Estate (banking), and Wholesale and Retail Trade (eating and drinking places). These gains were offset by losses in Construction (new home and commercial construction), Manufacturing (slow auto sales forced periodic shutdowns of the State's two auto assembly plants), and Government.

Other 1990 highlights:

- Delaware's unemployment rate in 1990 was 5.1%, compared to 3.5% in 1989. Nationally, Delaware's jobless rate ranked 19th lowest in 1990, compared to third lowest in 1989. Regionally, Delaware ranked third lowest in 1990, compared to having the lowest rate in 1989.
- Services remained Delaware's #1 employer. This sector, which includes business and health services, made up 24.5% of Delaware's total job picture, compared to 23.9% in 1989.
- The average weekly wage of $470.26 equates to an annual salary of more than $24,400, a 5.1% increase over 1989 figures.
- In 1990, Kent County had the highest unemployment rate in Delaware at 6.2%, while Sussex County had the lowest at 4.9%. New Castle County, which contains two-thirds of the State's labor force, had a rate of 5.1%.
- The average length of unemployment insurance claims increased to 12 weeks in 1990 from 10 weeks in 1989. The average claimant received $155.00 per week.

"As companies continue to streamline their operations and eliminate jobs, the employment situation in Delaware and surrounding states will continue to be weak for the foreseeable future," said McFadden. "Our goal now is to assist job seekers in their search, as well as encourage development of the types of skills necessary to compete for available openings."

For a copy of ***Delaware Labor Market 1990: The Year in Brief***, please call the Delaware Department of Labor's Office of Occupational and Labor Market Information at (302) 368-6960.

Trends in the Health Service Industry

The next time you look through the newspaper, browse through the want ads. In addition to noticing that jobs arent't plentiful, you'll see that of the jobs available, a good majority of them are in the health services field. A wide range of opportunities are available from nursing, to physical therapy, to management positions.

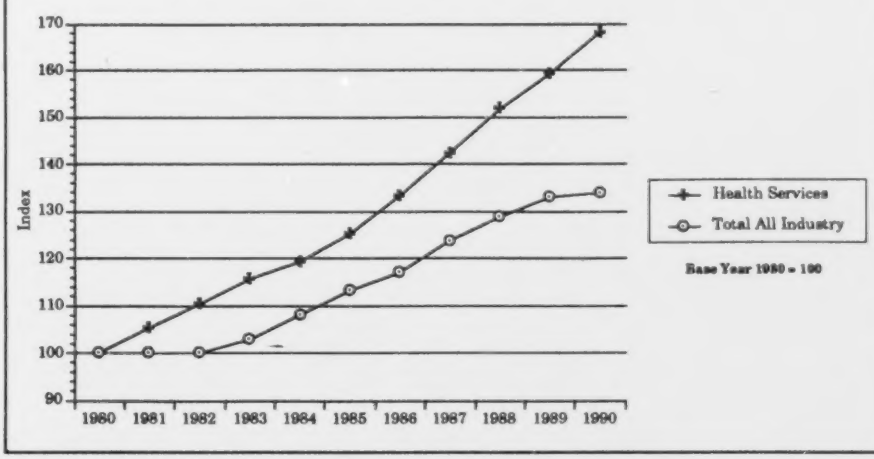
Health services was one of the fastest growing industries in Delaware during the economic boom of the 1980s, growing twice as fast as all industries combined. From 1980 to 1990, all-industry employment grew by about 87,000 jobs or 34%. Health services accounted for 9,200 jobs, as employment increased from 13,500 to 22,700, a 67% increase. In 1990, health services' total payroll in Delaware was $590 million.

The average annual wage in health services in 1990 was $26,045 compared to $24,453 for total all-industry. Since 1980, wages in health services have increased by 87%, much faster than the total all-industry increase of 60%.

Delaware Health Service Employment by Sector, 1980 and 1990

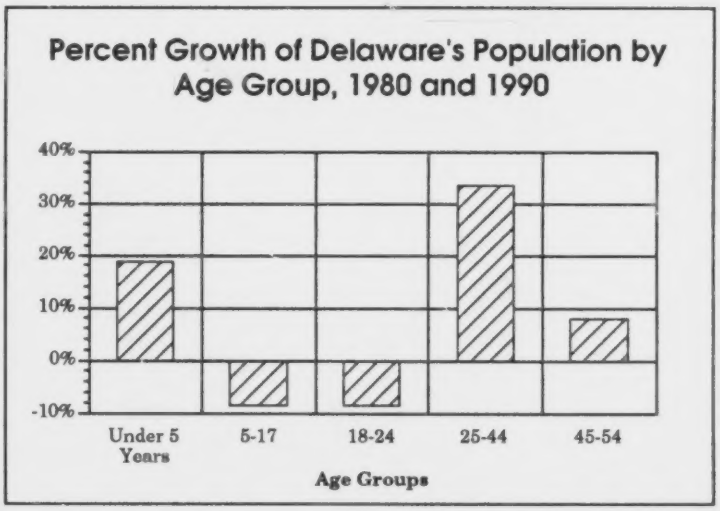
	1980	1990	Change 1980-1990 Net	Change 1980-1990 Percent
Offices of Doctors of Medicine	1,809	3,565	1,756	97.1
Offices of Dentists	978	1,374	396	40.5
Offices of Doctors of Osteopathy	70	163	93	132.9
Other Health Practitioners	197	788	591	300.0
Nursing and Personal Care Facilities	1,638	3,472	1,834	112.0
Hospitals	8,025	11,325	3,300	41.1
Medical and Dental Laboratories	421	460	39	9.3
Home Health Care Services	246	1,086	840	341.5
Other Health and Allied Services	166	422	256	154.2
	13,550	22,655	9,105	67.2

Growth of Delaware's Health Services Sector, 1990



During the current recession, the health services sector has been somewhat resistant to the economic downturn. In fact, growth in health services has been a stabilizing factor in an otherwise bleak economy. Although growth has slowed, employment has not declined as in many other sectors. Health services employment in July, 1991 has increased slightly by about 200 jobs from the same month last year. This performance is much better than that of the services sector as a whole, which is down 1,500 jobs during the same period.

Within the health services sector, hospitals is the largest category, comprising 50% of total jobs. The next largest components are offices of doctors as well as nursing and personal care facilities, with 1990 employment levels of 3,565 and 3,472, respectively. But, the fastest-growing component is home health care services with employment growth of 341% since 1980.



The Delaware Department of Labor projects above-average employment growth in health services to the year 2000. Why? An aging population, plus the ability of medical technology to prolong a person's life well into his or her eighties and beyond, creates a critical need for geriatric health services, such as home- and hospital-based nursing care. This, in turn, creates a need for individuals to provide these services.

In general, allied health technologies are becoming more complex and require additional training, therefore opening up new specialty areas and job opportunities.

Consider these statistics: from 1980 to 1990, the age group aged 65 and over was the fastest growing age segment in Delaware, increasing 36%. Delaware's 80+ population is projected to increase by 80% by the year 2010.

Delaware's population requires a new focus on health care--both in preventive care by the promotion of healthy lifestyles and by the provision of appropriate and available medical services for all of our citizens.

Unemployment Insurance Statistics

	July 1991	June 1991	July 1990	% Change From Prior Month	% Change From Year Ago
Initial Claims-Total *	10,182	3,356	6,162	203%	65%
Auto Makers	5,450	0	2,998	****	82%
Non-Auto	4,732	3,356	3,164	41%	50%
Weeks Claimed **	45,312	25,084	22,910	81%	98%
Auto Makers	10,283	0	5,882	****	75%
Non-Auto	35,029	25,084	17,028	40%	106%
First Payments #	1,892	1,272	1,807	49%	5%
Final Payments ##	620	386	213	61%	191%
Weeks Compensated @	34,112	23,317	20,763	46%	64%
Amount Compensated	5,944,230	3,889,433	3,446,732	53%	72%
Average Weekly Check Amount	$174	$167	$166	4%	5%

* **Initial Claims** include New Initial Claims and Additional Initial Claims. A New Initial Claim is filed when a person becomes unemployed and files for unemployment insurance for the very first time in a benefit year. Additional Initial Claims are filed when someone has already filed a New Initial Claim due to unemployment, returned to work for at least a week, and then become unemployed again.

** **Weeks Claimed** account for the total number of weeks claimed for unemployment insurance within a given month.

\# **First Payments** are New Initial Claims that receive unemployment compensation checks.

\## **Final Payments** occur when a claimant receives the last check in his or her benefit cycle (not to exceed one year).

@ **Weeks Compensated** account for the number of Weeks Claimed that were paid during the month.

Initial claims in July rose to over 10,000 for only the second time since January 1983, as the state's auto plants shut down for model changeovers. Coupled with the auto layoffs was a 41% increase in non-auto claims. This represents nearly 5,000 non-auto claims for July spread across several industry sectors. As non-auto initial claims historically have tended to remain relatively constant from June to July, this is a strong indication of a continued general weakness in Delaware's labor market.

Another negative sign is the 61% increase in final unemployment insurance payments. Six hundred and twenty workers exhausted their benefits in July, the highest number since the early 1980s. Nationally, 318,000 out-of-work Americans exhausted their benefits in July, the highest level in at least 40 years. When Congress reconvenes this month, lawmakers hope to push through a bill that provides extended benefits to exhaustees. To date, President Bush has already signed a bill extending benefits, but offered no way to fund it, thereby effectively killing the measure.

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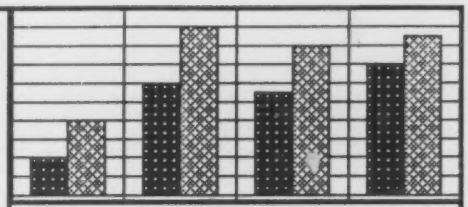
Delaware Digest

Labor Market Monthly

Volume 1, No.5 September, 1991



Delaware Department of Labor
Office of Occupational & Labor Market Information

Temporary Auto Layoffs Shift Delaware's Unemployment Rate Higher

Delaware's unemployment rate rose to 6.7% in August, 1991 from 6.4% in July, 1991 due to a temporary layoff at the General Motors auto assembly plant. The rate in August, 1990 was lower at 5.2%. The number of jobless Delawareans in August, 1991 was 24,643 compared to 23,496 in July, 1991. From August, 1990 to August, 1991, Delaware's labor force rose from 364,634 to 365,508.

Total nonagricultural employment fell by 3,600 over the month to 342,700 jobs. Over-the-month job losses were in **manufacturing, government, transportation and public utilities,** and **construction**. Over-the-month job gains were in **wholesale and retail trade,** due to modest gains at major department stores.

Unemployment Rate-Delaware and U.S.A.
August 1990-August 1991

Additional copies of the ***Delaware Career Compass*** are still available. The ***Career Compass*** is an all-inclusive career planning publication that takes job seekers from the very early stages of career selection to the job interview and beyond. For copies, call (302) 368-6960.

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Labor Force Trends

Delaware's unemployment rate rose slightly to 6.7% in August 1991 from 6.4% the previous month, due to a temporary layoff at the General Motors Boxwood Road auto assembly plant. The rate in August, 1990 was lower at 5.2% as both auto plants were fully operational at that time and the impact of the recession had not hit full stride. The number of jobless Delawareans in August, 1991 was 24,643 compared to 23,496 in July, 1991.

Nationally, the unemployment rate was 6.5% in August, 1991, the first time in three months that Delaware's rate has been higher than the U.S. figure. For the first eight months of this year, Delaware's unemployment rate averaged 6.9%, compared to a U.S. rate of 6.8%. In September, Delaware's rate may be lower due to the recall of auto industry workers laid off during August. Delaware's rate should track closely to the U.S. rate for the rest of the year.

From August, 1990 to August, 1991, the State's labor force rose slightly from 364,634 to 365,508. The labor force includes people, over the age of 16, who are working or actively seeking work. The estimate of employed Delaware residents is down over the year from 345,849 to 340,865.

All areas and counties in Delaware are experiencing higher unemployment rates compared to a year ago. The area with the highest unemployment in August, 1991 was the city of Wilmington with a rate of 9.1%. Kent County had the highest county rate at 7.7%. Sussex County had the lowest rate at 4.8% as a result of seasonal activity in agriculture, food processing, and the summer resort season.

Recent national economic news has been mixed, making it difficult to gauge the direction the economy will take in the coming months. The Index of Leading Economic Indicators was flat in August, compared to an average 0.8% increase each month since last February.

Factory orders fared worse as orders for manufactured goods fell 1.9% last month after posting their highest gain in 21 years in July. Some analysts wonder if the industrial sector can continue to lead economic recovery without more consumer spending.

In August, new home sales rose 6.7%, a one-year high. Analysts predict this news should spark more housing starts and allow the industry to carry on its traditional role of leading the economy out of the recession.

In Delaware, August initial unemployment claims (non-auto) were down over the month by 33% and 7% lower than in August, 1990. Although a slight improvement is indicated here, a one-month change in initial claims statistics is by no way a measure of projected economic improvement. Several more months in the same direction are needed before an accurate prognosis of improved health can be made.

Delaware's Civilian Labor Force

	August 1991	July 1991	August 1990
Civilian Labor Force	365,508	368,061	364,634
Employment	340,865	344,565	345,849
Unemployment	24,643	23,496	18,785
Unemployment Rate	6.7	6.4	5.2
National Unemployment Rate	6.5	6.7	5.4

Local Area Unemployment Statistics

August, 1991 - Preliminary

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide	365,508	340,865	24,643	6.7
2. Wilmington, PMSA	313,753	291,490	22,263	7.1
3. New Castle County	245,058	227,651	17,407	7.1
4. Balance of NCC (1)	211,179	196,841	14,338	6.8
5. Wilmington City	33,879	30,810	3,069	9.1
6. Newark City	13,650	12,712	938	6.9
7. Kent County	51,801	47,830	3,971	7.7
8. Sussex County	68,649	65,384	3,265	4.8
9. United States (Non-Seasonal)	126,097	117,859	8,237	6.5
10. United States (000's) (Seasonal)	124,904	116,416	8,488	6.8

July, 1991 - Final

Labor Area and Subareas	Labor Force	Employed	Unemployed	Unemployment Rate
1. Statewide	368,042	344,555	23,487	6.4
2. Wilmington, PMSA	315,914	295,486	20,428	6.5
3. New Castle County	245,805	230,534	15,271	6.2
4. Balance of NCC (1)	211,421	199,334	12,087	5.7
5. Wilmington City	34,384	31,200	3,184	9.3
6. Newark City	14,057	12,873	1,184	8.4
7. Kent County	52,697	48,472	4,225	8.0
8. Sussex County	69,540	65,549	3,991	5.7
9. United States (Non-Seasonal)	127,327	118,751	8,576	6.7
10. United States (000's) (Seasonal)	125,214	116,712	8,501	6.8

(1) Balance of NCC equals New Castle County minus Wilmington City

NOTE: Due to rounding, totals may not add and data may not match similar statistics published in various other state or National releases.

Industry Trends

Between July and August of this year, Delaware's nonagricultural employment fell by 3,600 to 342,700 jobs. The loss was due mostly to the temporary layoff at the General Motors auto assembly plant.

Job losses were in **manufacturing** (temporary auto plant layoff due to annual retooling); **government** (seasonal decreases in education); **transportation and public utilities** (trucking and warehousing); and **construction** (general building and special trades). Over-the-month job gains were in **wholesale and retail trade**, due to modest gains at major department stores.

During the 80s and into the 90s, job change between July and August has averaged a gain of 1,700 jobs. This number, which is heavily influenced by layoffs or recalls in the auto industry, can show extreme shifts in either direction, making it difficult to establish a seasonal trend.

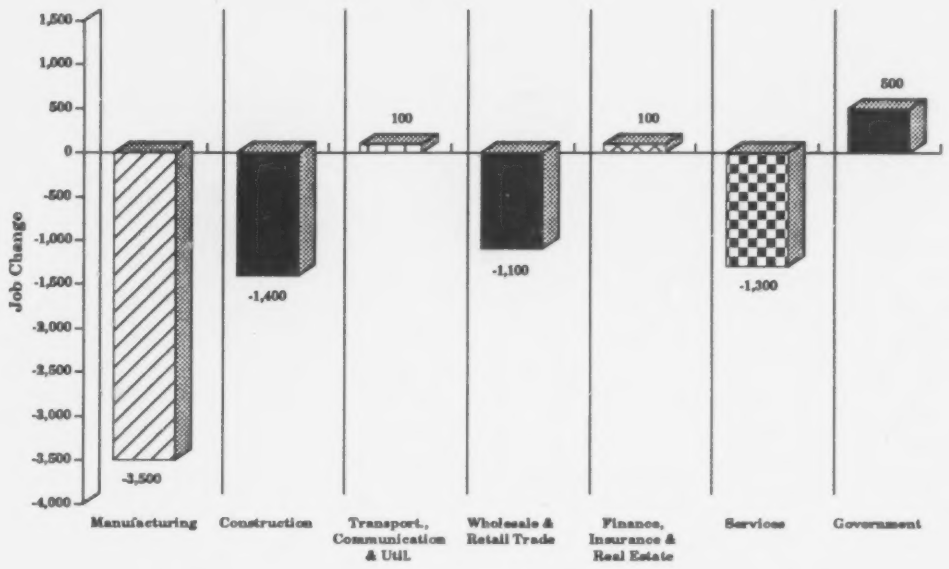
Since August, 1990, total nonagricultural employment has declined by 1.9% or 6,600 jobs. In August of last year, both auto plants were fully operating, while in August of this year Chrysler was open and General Motors was closed due to retooling.

Job losses since August of last year have been in **manufacturing** (auto industry; chemical industry); **contract construction** (general building; special trades); **services** (business services; engineering and managment services); and **wholesale and retail trade** (general merchandise stores). Over the year, employment gains have been in **government** (state education).

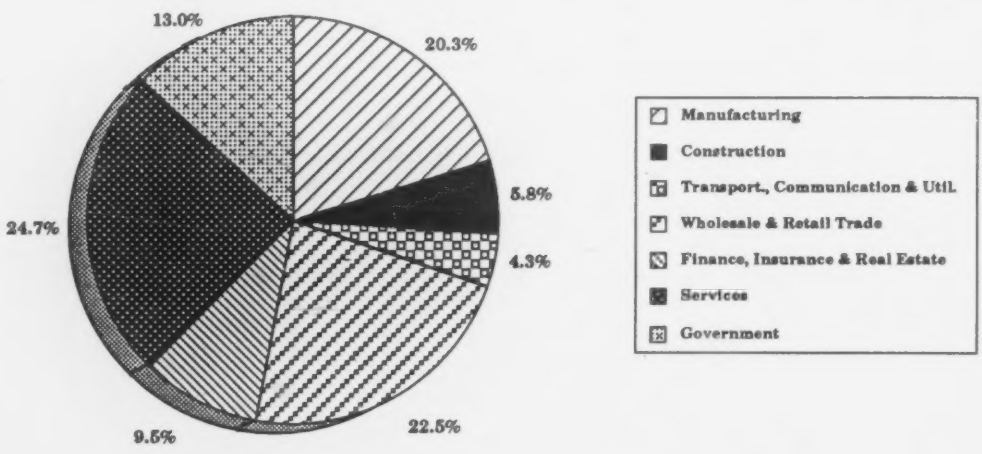
Delaware experienced a loss of 4,200 jobs, a decline of 1.2%, during the first eight months of this year, compared to the same period a year ago. Nationally, the decline in jobs during the first eight months was 1.0%. The region consisting of Maryland, Pennsylvania, New York, and New Jersey was down by 1.5%.

In future months, no model changeovers are anticipated at either of Delaware's two auto plants. For the balance of the year, any major turnaround for Delaware's key industries, such as finance, business services, chemicals, and contract construction, does not seem likely. It seems certain that 1991 will show the first net loss in non-farm jobs since the severe recession of 1975.

Net Job Change by Sector, Delaware, August 1990 -August 1991



Percent of Total Employment by Sector, Delaware, August 1991



Delaware Nonagricultural Employment by Selected Industry
(in thousands)

INDUSTRY GROUP	Aug 91	Jul 91	Aug 90	Net Change to Aug 91 from: Jul 91	Aug 90
TOTAL NONAG. EMPLOYMENT	342.7	346.3	349.3	-3.6	-6.6
GOODS PRODUCING	89.3	91.8	94.2	-2.5	-4.9
MINING	0.1	0.1	0.1	0.0	0.0
CONTRACT CONSTRUCTION	19.7	19.9	21.1	-0.2	-1.4
General Building Contractors	4.7	4.8	5.3	-0.1	-0.6
Heavy Construction Contractors	4.2	4.2	3.5	0.0	0.7
Special Trade Contractors	10.8	10.9	12.3	-0.1	-1.5
MANUFACTURING	69.5	71.8	73.0	-2.3	-3.5
Durable Goods	16.0	18.4	18.6	-2.4	-2.6
Primary & Fabricated Metals	3.0	3.0	3.2	0.0	-0.2
Machinery & Electrical Equipment	1.8	1.8	1.8	0.0	0.0
Transportation Equipment	5.6	8.0	7.8	-2.4	-2.2
Instruments & Related Products	3.0	3.0	3.1	0.0	-0.1
Other Durable Goods	2.6	2.6	2.7	0.0	-0.1
Nondurable Goods	53.5	53.4	54.4	0.1	-0.9
Food & Kindred Products	9.4	9.3	9.3	0.1	0.1
Textile, Apparel, Leather	1.6	1.5	1.6	0.1	0.0
Paper, Printing, Publishing	5.1	5.1	5.3	0.0	-0.2
Chemicals	33.6	33.7	34.2	-0.1	-0.6
Petroleum, Coal, Plastics	3.8	3.8	4.0	0.0	-0.2
SERVICE PRODUCING	253.4	254.5	255.1	-1.1	-1.7
TRANSPORTATION & PUBLIC UTILITIES	14.9	15.2	14.8	-0.3	0.1
Transportation	9.6	9.9	9.6	-0.3	0.0
Railroad Transportation	1.4	1.4	1.4	0.0	0.0
Local & Interurban Passenger Trans.	1.3	1.3	1.3	0.0	0.0
Trucking & Warehousing	4.8	5.0	4.8	-0.2	0.0
Other Transportation	2.1	2.2	2.1	-0.1	0.0
Communications & Utilities	5.3	5.3	5.2	0.0	0.1
Communications	2.2	2.2	2.2	0.0	0.0
Electrical, Gas & Sanitary Services	3.1	3.1	3.0	0.0	0.1
WHOLESALE & RETAIL TRADE	77.1	76.9	78.2	0.2	-1.1
Wholesale Trade	13.5	13.5	13.6	0.0	-0.1
Wholesale-Durable	7.7	7.7	7.7	0.0	0.0
Wholesale-Nondurable	5.8	5.8	5.9	0.0	-0.1
Retail Trade	63.6	63.4	64.6	0.2	-1.0
Building Material & Garden Supplies	2.8	2.8	2.9	0.0	-0.1
General Merchandise Stores	8.4	8.2	8.8	0.2	-0.4
Food Stores	9.6	9.6	9.7	0.0	-0.1
Auto Dealers & Service Stations	6.6	6.6	6.8	0.0	-0.2
Apparel & Accessory Stores	3.6	3.7	3.6	-0.1	0.0
Furniture & Home Furnishings	2.5	2.5	2.6	0.0	-0.1
Eating & Drinking Places	21.4	21.3	21.6	0.1	-0.2
Miscellaneous Retail	8.7	8.7	8.6	0.0	0.1

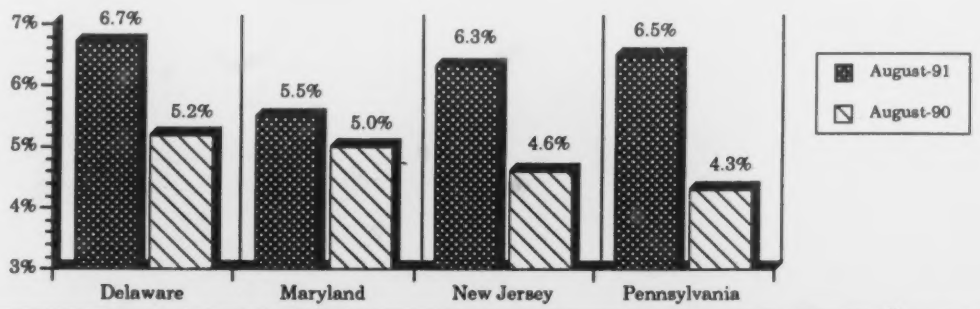
Cont'd

Delaware Nonagricultural Employment by Selected Industry
(in thousands)

INDUSTRY GROUP	Aug 91	Jul 91	Aug 90	Net Change to Aug 91 from: Jul 91	Aug 90
FINANCE, INSURANCE, & REAL ESTATE	32.4	32.5	32.3	-0.1	0.1
Finance	23.3	23.4	23.0	-0.1	0.3
Depository Institutions	20.3	20.4	20.1	-0.1	0.2
Other Finance	3.0	3.0	2.9	0.0	0.1
Insurance	5.7	5.7	5.6	0.0	0.1
Real Estate	3.4	3.4	3.7	0.0	-0.3
SERVICES	84.6	84.6	85.9	0.0	-1.3
Hotels & Other Lodging Places	3.2	3.2	3.3	0.0	-0.1
Personal Services	3.0	3.0	3.1	0.0	-0.1
Business Services	20.3	20.4	21.0	-0.1	-0.7
Automobile & Miscellaneous Repair	3.7	3.6	3.8	0.1	-0.1
Amusement & Recreation Services	4.1	4.1	3.9	0.0	0.2
Health Services	22.8	22.8	22.7	0.0	0.1
Hospitals	11.6	11.6	11.4	0.0	0.2
Other Health Services	11.2	11.2	11.3	0.0	-0.1
Legal Services	2.8	2.8	2.9	0.0	-0.1
Educational Services	3.5	3.5	3.3	0.0	0.2
Social Services	7.0	6.9	6.7	0.1	0.3
Engineering & Management Services	5.3	5.3	5.8	0.0	-0.5
Membership Organizations	5.5	5.5	5.7	0.0	-0.2
Other Services	3.4	3.5	3.7	-0.1	-0.3
GOVERNMENT	44.4	45.3	43.9	-0.9	0.5
Federal Government	6.0	6.0	6.0	0.0	0.0
State & Local Government	38.4	39.3	37.9	-0.9	0.5
State Government	22.1	22.5	21.5	-0.4	0.6
State Education	7.6	7.7	6.7	-0.1	0.9
State Non-Education	14.5	14.8	14.8	-0.3	-0.3
Local Government	16.3	16.8	16.4	-0.5	-0.1
Local Education	10.8	11.2	10.8	-0.4	0.0
Local Non-Education	5.5	5.6	5.6	-0.1	-0.1
Persons Involved In Work Stoppages	0.0	0.0	0.0	0.0	0.0

Current Data Preliminary; Previous Month Revised

Regional Unemployment Rates, August 1991



Hours and Earnings of Production Workers in Manufacturing Industries

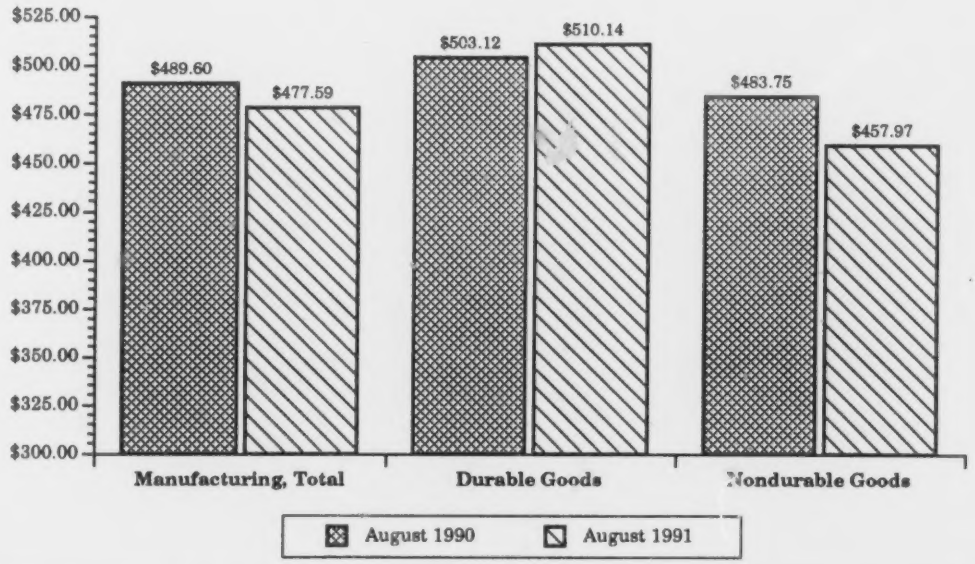
Delaware*

	Weekly Earnings			Weekly Hours			Hourly Earnings		
	Aug-91	Jul-91	Aug-90	Aug-91	Jul-91	Aug-90	Aug-91	Jul-91	Aug-90
MANUFACTURING	$ 477.59	$ 486.25	$ 489.60	39.7	39.5	40.0	$12.03	$ 12.31	$ 12.24
DURABLE GOODS	510.14	557.48	503.12	37.4	38.5	38.0	13.64	14.48	13.24
Primary & Fabricated Metals	447.64	452.35	416.10	38.0	38.4	38.0	11.78	11.78	10.95
Machinery & Electrical Equipment	633.38	600.50	528.26	45.6	45.7	39.6	13.89	13.14	13.34
Transportation Equipment	596.19	661.56	594.36	33.4	37.0	37.5	17.85	17.88	15.85
Instruments & Related	382.59	392.22	362.91	40.4	41.2	40.1	9.47	9.52	9.05
Other Durable Goods	367.35	360.96	353.61	39.8	38.4	37.9	9.23	9.40	9.33
NONDURABLE GOODS	457.97	434.84	483.75	41.0	40.3	41.1	11.17	10.79	11.77
Food & Kindred Products	336.96	319.20	331.14	40.5	39.8	39.8	8.32	8.02	8.32
Textile, Apparel, Leather	355.51	395.40	379.05	38.6	38.5	41.7	9.21	10.27	9.09
Paper, Printing, and Publishing	470.42	437.19	415.45	39.9	39.0	37.7	11.79	11.21	11.02
Chemicals	660.01	632.88	605.49	42.2	41.5	41.5	15.64	15.25	14.59
Petroleum, Coal, Plastics	477.81	445.77	482.22	42.7	41.7	47.0	11.19	10.69	10.26

*Covers an estimated 30,800 Production Workers

Current Data Preliminary; previous month revised

Delaware Average Weekly Earnings for Manufacturing Production Workers



The Department of Labor Serving You Better...

On October 4, three Delaware companies were recognized by Governor Castle for "going the extra mile" to ensure the safety of their employees. Free-Flow Packaging Corporation of Newark; Metal-Tech, Inc. of New Castle; and Plastic Materials Company, Inc. of Milford have qualified for the U.S. Occupational Safety and Health Administration's exemption program. Qualifying for the program exempts the companies from all generally scheduled Federal Occupational Safety and Health inspections for one year.

"These companies have clearly demonstrated the type of commitment that should be placed on ensuring a safe workplace for all employees," said Governor Castle. "I commend them for going beyond simply meeting the minimum OSHA standards by developing and implementing progressive and comprehensive safety programs."

Free-Flow Packaging Corporation has developed a proprietary system that recycles polystyrene, commonly known as Styrofoam, into a figure eight packaging material used to cushion objects during shipping. The product is nontoxic, made without ozone-depleting chemicals, and can be continually recycled.

Metal-Tech, Inc. produces finished metal products for both manufacturing and consumer use. The facility uses computer-controlled lathes which improve the product and reduce the time needed for training employees.

Plastic Materials Company, Inc., by contract order, primarily produces plastic pellets in tightly defined colors for use in plastics manufacturing by automobile and computer industries. The company also directly competes with foreign concerns to produce and market an American made plastic extruder which sells for $750,000 versus the $2 million foreign model.

Secretary of Labor Jan Ewing Robinson praised all three companies for their commitment to the safety and health of their employees. She encouraged other companies of under 500 employees to contact the department's OSHA Consultation Service for assistance in identifying, eliminating or controlling safety and health hazards. "There are no costs, fines, or penalties associated with this service," said Secretary Robinson. "By taking advantage of this service, some companies have even been able to qualify for workers compensation reduction from the Insurance Commissioner's Office."

Division of Vocational Rehabilitation

On October 2, the Governor's Committee on Employment of People with Disabilities honored two people as co-winners of the 1990 "Employee of the Year."

Bill Manella is a clinical social worker and owner of the Sussex Counseling Center. Severely orthopedically disabled since birth, Bill is married and has two children. The Department of Labor's Division of Vocational Rehabilitation helped him in networking and provided accommodations to help in the establishment of his business.

Catherine Brickman of Newark is the co-winner of this award. Catherine was paralyzed after a 1985 car accident and currently works for Digital Equipment Corporation as a Product Support Specialist. The Division of Vocational Rehabilitation assisted Catherine is adapting a van so that she can drive without help.

On the county level, Joanne Knox of the DuPont Company was presented with the New Castle County award. Herbert Predeaux, a technician for Intervet America, Inc., received the Sussex County award, and in Kent County, Scott Ward of Classic Realty in Milford was honored.

The Governor's Committee also honored Wachovia Bank Card Services in New Castle as the Delaware Employer of the Year for its efforts in hiring and accommodating people with disabilities.

The Sheraton Inn in Dover, Kent County; Rose's Stores, Inc., Sussex County; and the Bank of New York, New Castle County were presented county-level employer awards.

LMI: What is it?

Labor Market Information (LMI), as defined in economic terms, is: *information that describes and interprets the demographic and socioeconomic activities related to the marketplace through which the price and allocation of labor is established*. Simply put, however, Labor Market Information is about people and jobs.

One of the easiest ways to understand what Labor Market Information is and how it works is through personal observation. Labor Market Information is anything happening around you that indicates some type of economic activity. Road construction can mean new jobs in the construction sector. Expansion of a shopping center can indicate potential retail jobs. On the other hand, vacancies in the your local mall or office complex could indicate weak business activity. Pick up your local paper and notice the various economic activities happening around you.

Labor Market Information also comes in the form of statistics. The Office of Occupational and Labor Market Information (OOLMI) is the Delaware's Labor Market Information center. OOLMI gathers, analyzes, and disseminates LMI data on a wide range of subjects such as the unemployment rate, demographic data for affirmative action requests, civilian and military job descriptions, wage information, employment projections, occupational characteristics, specific questions about occupations (licensing, union etc.), training program descriptions, industry descriptions, and industrial outlook references to other career information.

In addition to providing statistical information to a wide range of data users, OOLMI also produces several LMI publications, including: ***Delaware Workforce 2000*** (an extensive overview of Delaware's workforce); ***Delaware Jobs 2000*** (employment projections for the period 1987-2000); ***The Changing Role of Women in Delaware's Workforce*** (tracks women's emerging importance in Delaware's labor market); ***The Delaware Digest: Labor Market Monthly*** (current data on Delaware's labor force), ***The 1990 Year in Brief***, (annual comparison of current year and previous year's Delaware labor market and ***The Delaware Career Compass***. (comprehensive career counseling tool).

LMI: Why Is It Important?

Labor Market Information has many users. Employers use LMI to determine wages, design working conditions, and evaluate alternative business opportunities. School counselors and students use LMI job projections to help select study programs and career paths. Educators and trainers use LMI to identify skill needs, develop school curriculums, and design and implement training programs. Job seekers use LMI to identify and evaluate employment opportunities in different industries and occupations. Labor Market Information helps policy makers evaluate the success of employment and training programs and target growth industries for economic development.

Where does LMI Come From?

The Bureau of Labor Statistics (BLS) of the U.S. Department of Labor generates a large portion of Labor Market Information. BLS provides funding and technical support to allow states like Delaware to gather and analyze data through employer surveys and use of Unemployment Insurance Statistics. Some of the data included are the unemployment rate, employment figures by occupation, employment and wages by industry, and data regarding company layoffs.

The Bureau of Labor Statistics also prepares data which are used in the *Consumer Price Index*, a monthly cost-of-living barometer. A valuable LMI tool is the annual report, *Geographic Profile of Employment and Unemployment*, which contains demographic data on the labor force as well as occupational and industry estimates of people in each state.

Another federal agency providing LMI is the Commerce Department. The Census Bureau conducts the Decennial Census which provides detailed statistics on population, housing income and occupational statistics. The Bureau Of Economic Analysis provides current personal income statistics such as per capita personal income.

Other sources of LMI include the Delaware Development Office, Delaware Population Consortium, Chambers of Commerce, County Planning Offices, and colleges and universities.

The Office of Occupational and Labor Market Information is routinely contacted by radio, television and the printed media for analysis and comments on current labor market trends. The office receives and responds to hundreds of telephone calls and letters each year. OOLMI labor market analysts frequently speak to groups interested in the impact of local labor market conditions on educational and/or economic program development. For more information on Labor Market Information services and publications, call OOLMI at (302) 368-6960.

LMI: Where Do I Get It?

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Unemployment Insurance Statistics

	August 1991	July 1991	August 1990	% Change From Prior Month	% Change From Year Ago
Initial Claims-Total *	3,374	10,182	5,727	-67%	-41%
Auto Makers	181	5,450	2,285	-97%	-92%
Non-Auto	3,193	4,732	3,442	-33%	-7%
Weeks Claimed **	47,761	45,312	18,475	5%	159%
Auto Makers	16,165	10,283	2,371	57%	582%
Non-Auto	31,596	35,029	18,475	-10%	71%
First Payments #	4,329	1,892	3,934	129%	10%
Final Payments ##	558	620	222	-10%	151%
Weeks Compensated @	46,189	34,112	20,042	35%	130%
Amount Compensated	8,748,815	5,944,230	3,316,091	47%	164%
Average Weekly Check Amount	189	174	165	9%	15%

* **Initial Claims** include New Claims and Additional Claims. A New Claim is filed when a person becomes unemployed and files for unemployment insurance for the very first time in a benefit year. Additional Claims are filed when someone has already filed a New Claim due to unemployment, returned to work, and then become unemployed again.

** **Weeks Claimed** account for the total number of weeks claimed for unemployment insurance within a given month.

\# **First Payments** are New Claims that receive unemployment compensation checks.

\## **Final Payments** occur when a claimant receives the last check in his or her benefit cycle (not to exceed one year).

@ **Weeks Compensated** account for the number of Weeks Claimed that were paid during the month.

Initial Claims for Unemployment Insurance benefits dropped sharply from July to August, led by a return to work at both of the state's auto plants.

Claims on employers other than auto makers also dropped, falling by one-third over the month. This 33% decline in non-auto initial claims is more than double the normal seasonal drop from July to August. Of the non-auto claims that were filed, a substantial portion were in auto-related industries (suppliers to auto manufacturers or new car carriers).

Perhaps more significant was the 7% decline from the August 1990 level of non-auto initial claims. This marks the first time this year that current-month claims have been below their year-ago levels.

The large increase in first payments over the month is essentially due to accounting procedures as auto workers transition to a new benefit year. Each worker who is laid off must re-establish his or her claim to benefits annually. This occurs most often in late summer as the plants shut down for retooling and model changeover.

The number of benefit exhaustees drawing their final payments remained high, although it did decline by 10% over the month. This group is likely to remain large until the state's economy picks up steam and hiring accelerates.

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